

PREPARED FOR:



IN PARTNERSHIP WITH:



Economic Development Strategic Plan

CHAUTAUQUA COUNTY, NY

AUGUST 2020

PREPARED BY:



120 West Avenue, Suite 303
Saratoga Springs, NY 12866
518.899.2608
www.camoinassociates.com

Executive Summary

Chautauqua County's public and private leaders are taking bold actions to overcome formidable economic challenges. In 2018, they rewrote the playbook by bringing a cross-section of leaders together to address common issues.

Chautauqua County's Economic Development Strategic Plan now provides a blueprint for game-changing actions to address systemic issues that will produce economic benefits for county residents, the State of New York, and the nation.

Last year, the Chautauqua County Partnership for Economic Growth (the Partnership) was formed to marshal resources, collaborate across sectors, and enhance the county's economic development capabilities. The next step was to develop a countywide economic development plan. County government took the lead to initiate a process that involved multiple public, private, and non-profit partners. These partners are working collaboratively to develop and execute the strategies included in the Economic Development Strategic Plan. In addition, the Partnership is confronted with adapting their role as the COVID-19 crisis delivers long-term impacts throughout the county and nation. This report documents how the Partnership can leverage its collective expertise to develop resiliency during the crisis and well into the future, and strategies that must remain a priority to shore up the county's economic standing in the long term.

Background

Chautauqua County is home to exquisite natural resources, best-in-class manufacturing production, and an unrivalled quality of life. The County boasts visitation assets that span four-seasons, from outdoor recreation such as snowmobile trails and kayaking, to arts, to cultural hotspots such as Jamestown's National Comedy Center and the world-renowned Chautauqua Institution. The natural landscape also lends itself to the county's industry mix, where agribusiness is supported by over 15,000 acres of grapes, 1,228 farms, and an array of value-added producers that provide local products for residents and consumers beyond the county's boundaries. Traditional manufacturing in the county has become more advanced, including custom and precision manufacturing, and the recent addition of pharmaceutical manufacturing (Athenex). With relatively high wages and good career paths, quality jobs are readily available that support many communities throughout the county.

**Chautauqua
County can build
on its employment
base and become
the center in
Western New York
for advanced
research and
manufacturing.**

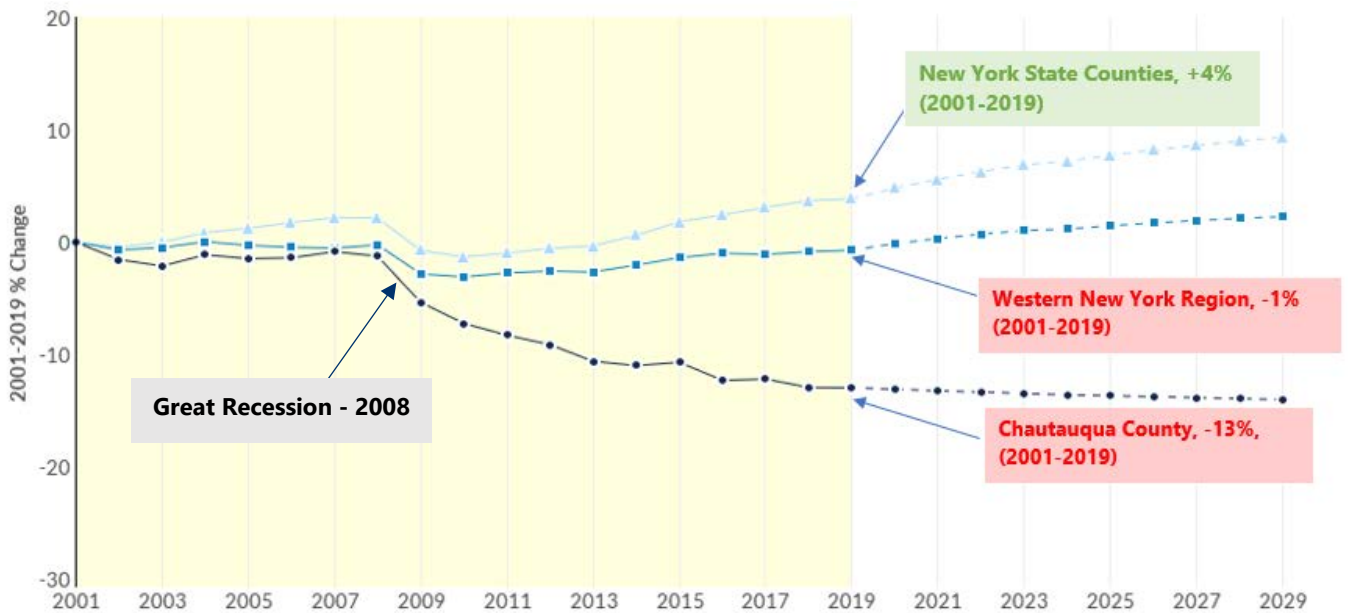
Chautauqua County, New York

These elements, along with the close-knit partners who coordinate efforts day in and day out, set the County on the precipice of a major economic turnaround. Along with many other manufacturing strongholds, the county’s economy suffered from many companies offshoring manufacturing jobs at the turn of the century, as well as cutbacks and consolidations that followed during the Great Recession. Today, manufacturing is the cornerstone of a new strategy for improvement. The nation learned difficult lessons by ignoring manufacturing at the start of the new millennium. Experience has revealed that innovation that advances manufacturing on American soil is an imperative to ensuring a strong and prosperous economy.

In the last decade, a resurgence has taken place in the northern areas of Western New York, with the most apparent progress occurring in Erie County. Massive state projects, namely the “Buffalo Billion” and Upstate Revitalization Initiative, were injected into Western New York to spur recovery. Chautauqua County saw some publicly and privately funded projects, such as the National Comedy Center, funding for renovations of some downtown buildings, and construction of the Harbor Hotel on Chautauqua Lake. In Dunkirk, the NRG Reuse Alternatives and Feasibility Study was issued, and is currently in progress, to determine if the facility can be put back into productive reuse in order to generate essential tax revenue for the city and county. In the southern portion of the County, plans have been finalized for the New York State Gateway Center at Ripley, a state-of-the-art facility on Interstate 90 that will welcome visitors to New York State and Chautauqua County. Other projects focused on municipal cooperation, improving infrastructure, and workforce training opportunities demonstrate the county’s commitment to overcoming challenging economic conditions.

That said, as the chart below indicates, these investments have not been enough to reverse the county’s continued aggregate job and population losses.

Job Percentage Change Comparison, 2001-2019



Chautauqua County, New York

A Call to Action

Across individual and group meetings, there is an enthusiasm to refine economic development delivery services in Chautauqua County in a method that emphasizes the best of what is currently underway, while eliminating duplication of services and adapting other programs to meet the needs of today. The Economic Development Strategic Plan (the Plan) is a call to action for the wide range of economic development partners in the county. The challenges loom large; however, this is an opportunity for the Partnership and its stakeholders to exhibit the best of what the county has to offer and make the case for why investment is crucial from state and federal partners.

Blueprint for Success

The Plan is informed by the expertise and realities faced everyday by corporate investors, economic development leaders, and workforce professionals across the county. The Plan provides a roadmap for leadership and staff to follow over the next five years, and enables partners on the ground to work toward shared goals. The County of Chautauqua Industrial Development Agency (CCIDA), the premier economic development agency in Chautauqua County, is prepared to work with the Partnership to help facilitate implementation and coordination among the multitude of economic development stakeholders.

The Economic Strategic Plan provides guidance on two levels:

- 1) A county-wide outlook that supports projects and initiatives that will incrementally transform Chautauqua County's economic standing in Western New York, and eventually, the state of New York. This Plan builds the case for substantial support from State, Federal, and philanthropic entities to support, protect, and grow industries of the future. It complies with the priorities of the Western New York Regional Economic Development Council and its core strategies: a) Implement Smart Growth; b) Foster a Culture of Entrepreneurship; and, c) Prepare Western New York's Workforce.
- 2) Organizational recommendations for the Partnership as it develops into a robust economic development entity tackling the challenges facing Chautauqua County stakeholders. It is understood that the Work Group members, led by co-chairs, will establish individual blueprints and projects to pursue on an annual basis. These initiatives are more granular in nature—project and task oriented—and draw from the individual skillsets and expertise of each of the stakeholder members in the individual work groups. It is expected that these projects and initiatives will support the overall goals and objectives of the plan.

Additionally, the strategy contains five “game changing” initiatives, one within each Work Group of the Partnership. These are ambitious and impactful initiatives that are intended to have greater economic implications. Because of their size, the investment required for each of the game changers is substantial; however, they will lead to positive results across work groups and sectors. Initiatives to catalyze the game changers are required in the short-term, but are expected to take some time for their impacts to be realized (between seven and ten years).

Chautauqua County, New York

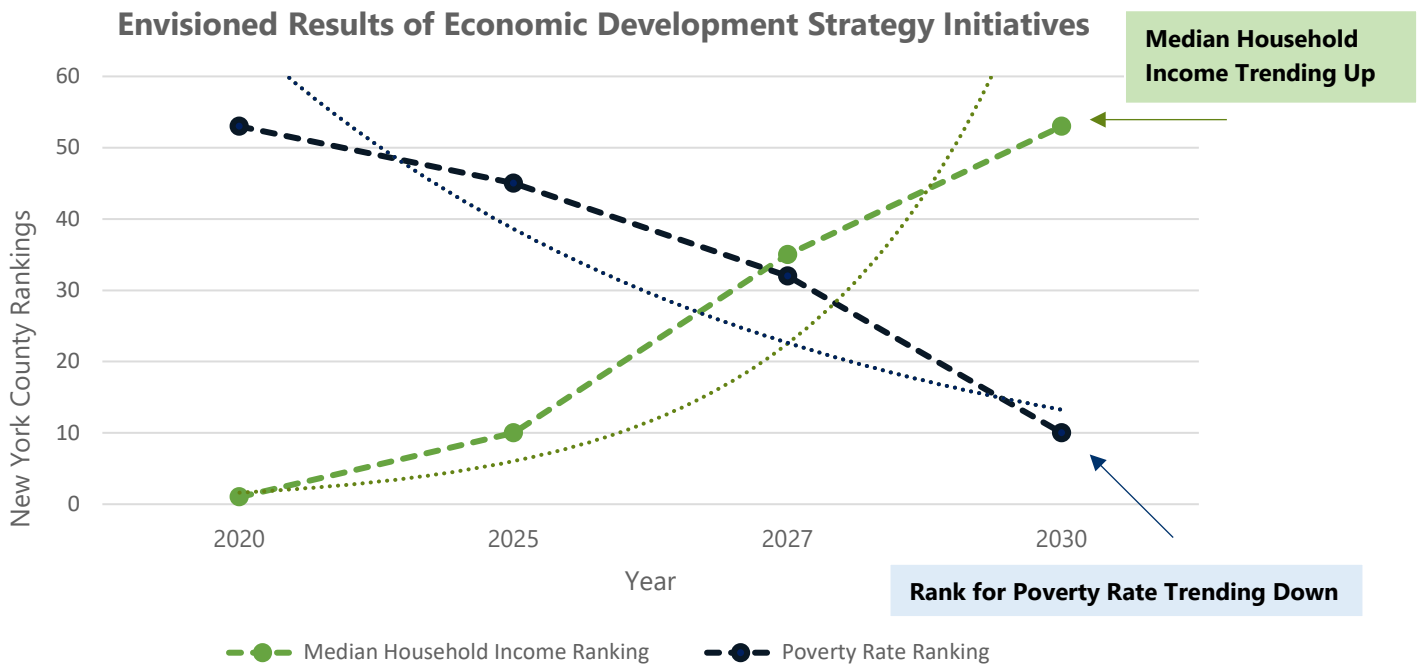
CHALLENGE	GAME CHANGERS	
<p>Between 2001 and 2019, Chautauqua County lost 7,840 jobs, a net job loss of 13%.</p> <p>As a result of this job loss, the county’s Gross Regional Product has suffered, stifling economic growth. To begin to reverse these trends and change the trajectory of Chautauqua County,</p> <p>Approximately 587 net new jobs would need to be added to the economy annually</p> <p>over the next decade. For 2020, this translates to an estimated investment (as measured by Gross Regional Product) of</p> <p>\$60 million</p> <p>This will not happen in 2020; however, with unprecedented attention and bold actions, county leaders are taking steps in the right direction.</p> <p>These <i>game-changing goals</i> will change the trajectory of Chautauqua County.</p>	<p>1</p>	<p>Business Development Develop appropriate site(s) for Advanced Manufacturing, Science, and Research Hub.</p>
		<p>Prepare physical infrastructure to align with the demands of the manufacturing sector and high-growth sub-sectors in Western New York, Eastern Ohio, and Northwest Pennsylvania.</p>
	<p>2</p>	<p>Workforce Readiness and Development Initiate and Maintain a Talent Retention and Attraction Campaign.</p>
		<p>Initiate and maintain a talent retention and attraction campaign with support and data from workforce and economic development partners and businesses.</p>
	<p>3</p>	<p>Housing Determine housing needs by category and location, and construct 500 housing units by 2030.</p>
<p>Provide a diverse range of housing styles in developed, walkable communities, to meet demands of today’s workers and active adults.</p>		
<p>4</p>	<p>Community Development Produce 10% Growth of Total Tax Revenue in Core Communities Over 7 Years.</p>	
	<p>Support projects and initiatives that add to a sense of place with focus on business startups, the gig economy, arts, culture, and livability in core communities.</p>	
<p>5</p>	<p>Tourism and Destination Development Increase Tourism by Number of Visitors by 50% in 5 years.</p>	
	<p>Develop year-round events, festivals, and activities, and enhance additional destinations that extend visitor stays.</p>	

Chautauqua County, New York

Expected Results

This Plan offers ambitious, but achievable actions which aim to reverse stifling economic trends of population loss, net job loss, and stagnant household incomes. Specifically, the Plan calls on public, private, and philanthropic partners to make immediate transformative investments and pivot their attention to these priorities, with the expectation that median household incomes (MHI) in Chautauqua County will grow significantly. As of February 2020, Chautauqua County ranked last in MHI among New York State’s 57 counties.¹ Using MHI as a target outcome will focus attention and help move the needle on other economic indicators such as poverty, which Chautauqua County now ranks as the 4th highest among all counties.

Through careful tracking of performance and adapting tasks as the plan advances, the Chautauqua County Economic Development Strategy will improve MHI, reduce poverty, and begin to reverse population loss. The goals and transformational initiatives of the Plan align with the five Work Groups that comprise the Partnership, and are broad enough to include other elements of economic development in Chautauqua County. A complete Action Plan Matrix, which is to be used as the implementation tool for this plan, is included as Appendix A.



¹ Excludes New York City and the five boroughs.

CONTENTS

Preface	2
COVID-19 Crisis and Economic Development Planning.....	2
Part I - Economic Context.....	8
Economic Base.....	8
Economic Opportunities.....	9
Part II - Looking Ahead	11
Capacity to Implement the Strategic Plan.....	11
Strategic Initiatives by Work Group	12
Business Development	12
Workforce Readiness and Development.....	14
Housing Development	16
Community Development.....	18
Tourism and Destination Development.....	20
Organizational	21
Metrics and Progress.....	24
Acknowledgements	26
Project Team.....	31
Appendix A: Action Plan Matrix.....	32
Appendix B: Economic Base Analysis	40
Appendix C: Industry Research.....	112

This page is intentionally left blank.

PREFACE

COVID-19 Crisis and Economic Development Planning

The conditions under which the Plan was prepared reflect economic realities in of early 2020. As of spring 2020, the economic and public health landscape are indefinitely changed and developing daily due to the impacts of the COVID-19 pandemic. The “game changers” and initiatives within the Plan are more relevant than ever to prepare and support a diverse economy with healthy workers and families. Yet in the short-term, the Partnership, the County, the CCIDA, and other partners are faced with the immediate and life-altering decisions that must be made by businesses large and small to weather the COVID-19 crisis.

The Partnership is poised to coordinate much of this work with the County, the CCIDA and stakeholders across industry sectors. While the Partnership was not developed with the intent of responding to a crisis per se, the 18 months that have gone into developing the structure of the entity has opened many conversations and opportunities to band together and procure resources. Projects that have been identified as priorities by each Work Group ultimately contribute to the economic health of the region and can be adapted to the current need. While millions of dollars are being marshalled through the federal government for crisis response, it is anticipated that there will be further rounds of recovery funding. With a clear, comprehensive plan for recovery, resiliency, and growth, Chautauqua County will be in a prime position to compete for these funding sources.

Business as usual must be abandoned and leaders must embrace a new normal, however uncomfortable. Government officials, business leaders, citizens, and civic champions, working together for the collective interest, must match federal, state, and local resources. This is the only way to shore up the resources needed by businesses. The County and its partners must meet the demands of the present so that on the other side of the COVID-19 crisis we can learn from this experience, build on the shifts that result from the crisis, and work collectively through long-term implications.

On April 6, 2020, the co-chairs of the Partnership Work Groups and other county stakeholders met via Zoom conference call to discuss the efforts already underway and other aspects of managing the COVID-19 public health and economic crisis. Like the rest of the nation, Chautauqua County is facing unprecedented job losses, not to mention significant lost revenues. Businesses across the industry spectrum have been affected due to dwindling consumer demand and supply chain disruption.

To date, the County and their partners have:

- Established an emergency working capital loan program, loaning out \$250,000;
- Applied for and been awarded an EDA CARES Act grant in to enable the CCIDA to establish a new \$10 million Revolving Loan Fund (RLF) to aid in economic recovery;
- Developed a Personal Protective Equipment (PPE) and Business Assistance Grant Fund;
- Created a webpage with a list of helpful resources;

Chautauqua County, New York

- Collaborated with the Chautauqua County Chamber of Commerce (CCCC) and other stakeholders on messaging and hosting resources, such as a list of restaurants that are still open for takeout;
- Fielded hundreds of phone calls from businesses and employees trying to make sense of the current situation and pointing them toward available resources;
- Developed press releases pertaining to companies that are pivoting their services to respond to the public health crisis;
- The CCIDA, CCCC, the CCVB, and the private sector collaborated to develop safety plan templates for reopening; and
- Created a shared spreadsheet where 30 companies responded with what they can or are willing to provide that can aide the state and others in fighting the pandemic.

Implications for the Partnership and Refocusing Priorities

While the Plan needs to be monitored for progress, the short-term priorities mentioned above are essential to engaging businesses and stakeholders in order to mitigate the immediate and long-term effects of the COVID-19 crisis. Economic Development Organizations (EDOs) and regional economic development partners are the advocates and conveners for resources, and should act as clearinghouses for resources, tools, and partners.

The two phases for managing the COVID-19 crisis are as follows: Phase 1 (which Chautauqua County has already undertaken with impressive speed) is mobilizing partners, funding sources, and businesses to respond to the public health and economic crisis, and Phase 2 is planning for the new reality following the immediate impacts of the COVID-19 crisis. Through the short-term response in Phase 1, the County can leverage opportunities for growth when the time is right.

Phase 1: Immediate Mobilization and Data Gathering

1.1 Prioritizing resiliency in preparation for growth. While the state and federal governments continue to allocate special funding to deal with detrimental effects of the pandemic, millions of dollars of capital will be available to communities that can demonstrate that they have a comprehensive approach to tackling issues that arose from COVID-19. In the near-term, the Partnership's priority will be aimed at addressing the ramifications of COVID-19 in their respective Work Groups. It will also be necessary to think more than only just the five working groups, and integrate additional sectors such as public health. Solutions to complex problems that arise from this crisis will be mitigated by joint action that cuts across sector silos. Pinpointing precise issues and developing collective solutions to test, implement, and adapt will increase the chances that businesses across the county are able to survive the crisis *and* be prepared to adapt to the new normal.

Immediate steps for Work Groups:

- Co-chairs meet with stakeholders digitally and define priorities facing their sector. Report back to the Partnership Manager;
- Partnership Manager to coordinate Work Group-wide meeting to address priorities and discuss the sharing of resources, making connections where possible, and triaging needs; and

Chautauqua County, New York

- Hold regularly scheduled calls to share information and monitor progress. While these regular calls can be brief, maintaining a regular schedule ensures that new items can be addressed quickly and the work group is updated on current events.

1.2 Acting as clearing house for resources: Navigating state and federal resources will be key to deploying funds to businesses. As of the writing of this plan, Congress passed the Coronavirus Aid, Relief, and Economic Security Act (CARES) on March 30, 2020 and includes funding through the Small Business Administration (SBA), Economic Development Administration (EDA), and additional unemployment assistance, among other financial support for industries and workers across the country. This funding is constantly evolving, with changing requirements and application systems. Additional funds are or will be available through industry organizations, philanthropic and non-profits organizations, and other private sector donors. While it would be impossible for the County to monitor and spend its time capturing all of these sources, remaining informed on the availability of funding by sector is critical in the immediate future. In addition, the Partnership and County can put out calls to its network of potential funders to procure resources for businesses. Businesses are preoccupied with maintaining operations, and therefore lack the time to search for resources. That being the case, communicating with what resources are available to businesses will reduce some of the barriers they currently face.

1.3 Continuing to develop the Business Retention & Expansion (BRE) program in crisis response. Bring back lessons learned to refine the BRE program regarding resiliency. Continue frequent communications with businesses with updates on resources and the role that the CCIDA and the Partnership are assuming during recovery. The needs of businesses will be a moving target as this crisis progresses, so there must be ongoing communications. Methods of communication must switch to all digital for the foreseeable future until social distancing measures are lifted. This will require staff to be fully trained and monitoring new tools for improving communication, either digitally or in print. For those businesses that must furlough workers or close for the time being, employees should be made aware or directed to available jobs through local and state resources such as the Department of Labor website.

1.4 Maintaining and supporting the conversation on public health research and supplies.

Continue discussions with state and federal policy leaders to support the need for ongoing medical research and testing that will allow the public to feel safe returning to daily life. Whether that is through greater access to thermometers, rapid response tests, or an adequate stockpile of vaccines, there will be lingering effects of this crisis that will need to be consistently monitored by various organizations, individuals, and businesses across the county.

Phase 2: Reopening to a New Reality

2.1 Using lessons learned to formulate and formalize a county-wide resiliency strategy. Whether it is weather, economic, or health related, this crisis has made clear that a resiliency plan is critical to mobilizing and securing available resources. A resiliency plan doesn't insulate businesses or communities from the crisis, but it can help quickly assess damages, set up communication channels, and otherwise

Chautauqua County, New York

help businesses recover. Building on what has been learned on the ground during COVID-19 will be the starting point for a resiliency plan. Just as Western New York is prepared for major weather events that would bring other portions of the country to a grinding halt, preparing for the next round(s) of COVID-19 or another health-related crisis will be key to stabilizing the county's communities. This plan must focus on the items that the County and municipalities have control over, especially in times of crisis. It should also build in plans for working with partners at the state and federal levels to create an understanding of who is responsible for what. A well-thought out resiliency plan can not only become part of a BRE toolkit, it can be part of a business attraction program demonstrating to businesses that Chautauqua County plans for the best but is prepared for the worst. This will most certainly help businesses survive with the help of dedicated economic development partners.

2.2 Developing technical assistance for businesses in a post-COVID reality. When all sectors of the economy reopen, their business models could be fundamentally changed. At a minimum, businesses will need to manage the societal shifts that resulted from the crisis. Preparing guides, technical assistance, and/or other resources to help businesses with additional safety protocol procedures, customer management, or digital presence will be key to ensuring that existing businesses can adapt to the after-effects of the pandemic. Intelligence learned from ongoing communication with businesses throughout the crisis will help develop the initial list of business needs. This list will continue to develop but may include:

- Assistance with reopening safety planning, workplace-reconfigurations, and access to PPE;
- Building a business's online presence;
- Adapting physical space to allow for more room between customers;
- Marketing materials that communicate how businesses are keeping their facilities clean and sanitized; and
- Communicating with vendors on expectations to increase inventory to build resiliency.

2.3 Framing Chautauqua County's strengths for lifestyle shifts post-COVID-19. While much is still uncertain about what society's mindset will be after the crisis, the County can anticipate changes in how people live, work, and recreate.

Live: It is likely that metropolitan areas will continue to grow post-crisis; however, it may be at a slower rate. The trend towards urbanization has persisted through other extreme health and economic crisis over the course of history across the United States and globally. Yet, there may be an opportunity for small- to mid- sized cities to draw in residents who still want a downtown with entertainment, restaurants, and retail at a lower density than the larger urban metropolises (Note that these markets were already seeing growth prior to the crisis). Jamestown and Dunkirk could benefit from this trend, yet there will be increasing pressures on housing, infrastructure, and broadband that may be needed to accommodate this demand. Collaborating with the public and private sectors to creatively fund a diverse housing base will be critical in order for Chautauqua County to attract residents.

Chautauqua County, New York

As economic developers and planners discuss creating a “sense of place,” the need to include public health measures will be key. In waterfront development or the redevelopment of downtowns, thinking about the circulation of people, cars, bikes, and public transportation will be key in designing spaces that encourage activity, but also allow space for people to keep an appropriate distance from each other. These are defining features that differentiate one community from another, and taking the time to strategically design these elements will be attractive for investment.

Work: As working remotely is now a necessity for those who are able, real estate markets are feeling the ramifications as office space is deemed obsolete, or at least less frequently in demand. Where and how employers utilize space for operations and management will continue to evolve throughout this crisis. Yet, working remotely relies on adequate broadband connectivity. There is an ongoing need to support the growth of high-speed internet across all portions of the county, especially if the region hopes to support additional residents and businesses working out of the home. Businesses may also need to assist their employees in setting up home offices. While many remote workers have improvised in setting up their home offices for the time being, in the long-term, standards for home office expectations will likely require technical assistance from the county or other sources.

Recreate: The region’s recreation, entertainment, and hospitality industries will also need to adapt to transportation and travel restrictions. As the crisis runs its course and people are encouraged not to travel via plane or public transportation, an opportunity exists to expand market share within driving distance of Chautauqua County institutions. Working collectively to market Chautauqua County’s recreational offerings *and* working with individual businesses to implement similar recreation-based strategies will help draw traffic to the area and will provide assurances to visitors that precautions are being taken across the county. Additionally, if seasonal businesses are forced to reduce or shut down in the coming summer months, adapting some programming or marketing to an online version would help expand awareness of Chautauqua County and set the stage for visitors to come to the region after travel restrictions have been lifted. The opportunity for “safe-cations” should be highly publicized in Chautauqua County.

Cultural and arts institutions are in a precarious position during the COVID-19 crisis. While small businesses have some access to funding sources, many arts and cultural organizations may not qualify for these or other funds. Understanding these organizations’ needs, adapting local funding sources, and otherwise working with volunteers and staff to adapt their operations will be key so that these organizations survive. When the population reemerges from social distancing or voluntary quarantine, there is likely to be a surge in demand for experiencing experiential entertainment in a new way.

2.4 Adapting and innovating manufacturing. Because of global supply chain disruptions due to the pandemic, manufacturers and other industries are rethinking inputs to their goods. In the immediate term, companies who remain open have focused on locally sourcing or adapting their products based on what is available to them or what the market demands are. In the long term, it is the belief that companies will be looking to adapt their supply chains to be more regionally based and/or have increased supply redundancy in the event of another public health crisis or detrimental economic event. One way to support resilient industries is to understand the supply chains of major industries to determine inputs that would increase local production and make companies less reliant on international products.

Chautauqua County, New York

Additionally, there may be lasting implications on how we attend public events and go about our daily lives. PPE, sanitizers, and other items that make the public feel safer will likely remain in demand for the foreseeable future. While the county's manufacturers are rising to the occasion now to meet immediate needs, thinking about how these manufacturers can continue to not only meet demand but also adapt and innovate these products for long term needs could put the county's businesses ahead of others in the market.

2.5 Taking a holistic approach to economic development. The widespread effects of COVID-19 illustrate that economic, business, health, housing, and community systems are interconnected and dependent on each other. Vulnerabilities are not limited to one population, especially in a pandemic, where a virus can easily transfer from human to human. Through the Partnership structure, the Work Groups should focus on economic development in a holistic manner, where everything from workforce training, childcare, housing options, and schooling are all considered critical in supporting communities and contributing to the overall wellbeing of all residents of Chautauqua County.

PART I - ECONOMIC CONTEXT

Economic Base

As part of the initial research to produce an economic development strategy for Chautauqua County and the Partnership for Economic Growth, Camoin 310 gathered and analyzed economic data to fully understand demographic and economic conditions in the county. Key findings of this comprehensive data analysis can be found in Appendix B. Major themes from the findings of the analysis include:

- ◆ **Manufacturing is critical to the county's economy.** Based on 2019 employment figures, Manufacturing is 2.14 times more concentrated in Chautauqua County relative to the rest of the country. It comprises 17% of total jobs in the county and contributes to approximately a quarter of the county's total Gross Regional Product, the single largest proportion of any industry. The high concentration of manufacturing in the county presents opportunities to be capitalized upon. Yet, as the manufacturing industry continues to evolve, further downturns in the industry would have significant ramifications on the entire county's economic activity. Continuing to innovate manufacturing production, meeting the latest market demand, and ensuring that producers have access to a quality workforce and capital to be productive is vital to the future of the county's economy.
- ◆ **Stage 2 companies, those with 10-99 employees, were the only segment of businesses that did not shed jobs between 2013-2018. These companies added 100 jobs.** Self-employed, Stage 1 (2-9 employees), Stage 3 (100-499 employees), and Stage 4 establishments (500+ employees) all lost jobs. Stage 4 establishments contracted by 22% (a loss of 4,200 jobs), this data demonstrates an opportunity to assist Stage 1 and Stage 2 businesses to stabilize and scale up their operation within the county to mitigate job losses. It also reveals the need to assist larger businesses that may be downsizing due to technological advances or may be contemplating moving out of the region.
- ◆ **Education and hiring trends in the county suggest that trade skills and soft skills not requiring 4-year college degrees are most in demand by employers in Chautauqua County.** This is reflected in educational attainment figures. A greater percentage of Chautauqua County residents hold Associate's Degrees compared with Western NY, New York State, and the nation. Additionally, approximately 12% of county residents have Bachelor's degrees. This compares to nearly 17% in Western NY, and over 20% in the state and the nation.
- ◆ **The percentage of remote workers in Chautauqua County is larger than in Niagara, Erie, Cattaraugus, and Allegany Counties.** At 3.7%, the proportion of remote workers in Chautauqua County is still smaller than the national average of 5%; however, based on trends in talent attraction and flexible workstyles, there may be an opportunity for the county to leverage its quality of life assets to grow this segment of the labor force.
- ◆ **According to the 2013-2017 American Community Survey, Chautauqua County had a net migration of 1,304 residents during that 5-year timeframe. With a positive net in-migration, but overall population loss, the county demonstrates a negative natural**

Chautauqua County, New York

increase. In other words, there are more deaths in the county than can be compensated for with in-migration. The top outbound counties, or places that Chautauqua County residents moved to, are located out of the state. These include Wake County, NC; Erie County, PA; Polk County, FL; Warren County, PA; Stark County, OH; and Cuyahoga County, OH.

- ◆ **Chautauqua County generates the most visitor spending of Western New York's most rural counties.** It accounts for about \$261,522,000, along with half of the local taxes associated with visitation.

Economic Opportunities

CAPITALIZE ON THE COUNTY'S SITES, OPEN LAND, AND AVAILABLE SPACE FOR REDEVELOPMENT.

After a decade of substantial redevelopment in the Buffalo-Niagara area, the supply of remaining sites with appropriate infrastructure or space for redevelopment is low. Chautauqua County has the benefit of available open space and an inventory of industrial land and brownfields, which are eligible for federal incentives to bridge financing gaps to make projects economically feasible. Site preparation investment, while costly on the front end, would have lasting positive impacts on the region. Prioritizing resources to develop 2-3 sites, and the development of a Western New York Mega-site that aligns with the target industries and regional market demand, will increase the desirability of Chautauqua's location. Real-time information from companies with potential interest in New York State reveal that available labor and access to production resources is required to attract prospective investors and develop sites, but that this is lacking in the Buffalo-Niagara region. Chautauqua County's proximity to this market presents an opportunity to meet this demand in Western New York. With the recently completed Phase I Chautauqua County Brownfields Development Strategy, implementing the highest priority recommendations will help advance not only the condition and readiness of these sites, but the marketing materials that showcase what Chautauqua County has to offer the business and development communities.

ESTABLISH INDUSTRY BASE FOR CLUSTERS BY LEVERAGING SIGNATURE PROJECTS, SUCH AS ATHENEX.

Chautauqua County and Western New York have a legacy in the manufacturing industry, which continues to incorporate advanced technologies into their processes to improve production and remain competitive. Today's manufacturing plants are a combination of digitalized processes managed and supported by industrial technicians, among other roles. Workforce training and the availability of skilled labor is critical to ensure that manufacturing remains a viable and profitable industry in Chautauqua County. With institutionalized knowledge and established resources in manufacturing, growing and adapting this cluster must be a top priority. In addition to manufacturing subsectors, such as Vehicle Component Manufacturing and Technology, Chautauqua County's industry mix and economics demonstrate the upward trend of other target industries such as: Agribusiness; Value-Added Manufacturing; and Healthcare Research &

Chautauqua County, New York

Development. Given the assets noted above, Chautauqua County is well positioned to establish a center of excellence for production-related advanced manufacturing, research, and innovation.

CONTINUE TO GROW THE TOURISM INDUSTRY AROUND VISITATION NODES AND INVEST IN THE CONNECTIONS BETWEEN DESTINATIONS.

Chautauqua County is renowned for its tourism offerings such as the celebrated Chautauqua Institution. From outdoor recreation in the winter and summer months, to new additions such as the National Comedy Center in Jamestown, Chautauqua County has something for everyone. The North and South portions of the county have unique tourism venues; however, the transportation connections between these locations is lacking. Established routes between sites and showcasing the vast options to distinct target demographic markets could help grow visitation numbers and spending figures. In addition, the establishment of a tourism shuttle would serve the tourism venues well.

GROW ENTREPRENEURIAL CULTURE AND BUSINESSES FROM WITHIN.

While preparing large sites for business attraction is one strategy to grow the county's economy, cultivating the business community from within the region provides near term opportunities to grow the economy. It is essential to take steps to showcase resources that currently exist for start-ups and small businesses that wish to grow. Adding to existing resources through New York Homes and Community Renewal's (HCR) micro-enterprise grant program and promoting internal organizations such as Chautauqua Opportunities for Development, Inc. (CODI) will continue to expand the entrepreneurial network. It is also necessary to take a step back to describe and promote business start-up opportunities, entrepreneurship, and make the case for why residents should consider starting a business in Chautauqua County. Institutions such as the Small Business Development Center at Jamestown Community College and the Fredonia Technology Incubator have certainly made strides in this arena. Making this a county-wide priority will strengthen the message across the region. Collaboration through the Partnership aims to cut down on the duplication of efforts and ensure that each partner is best equipped to deliver the services that most appropriately suit their skillsets. Public communication regarding which partner delivers which services is similarly critical to streamlining resources and helping businesses efficiently connect with the services they need.

MAKING SENSE OF PLACE CENTRAL TO ALL ASPECTS OF ECONOMIC DEVELOPMENT.

Chautauqua County was not alone in experiencing net population loss over the last several decades. Nearly all upstate counties experienced this phenomenon. However, where there were population gains in urban centers, including, Buffalo, Rochester, and Saratoga. Chautauqua County's downtowns are at the cusp of acting as attractors to the county. Smaller cities, with urban amenities and a small-town vibe, are in high demand. Massive investments in infrastructure, downtown revitalization, and placemaking have all helped to improve the sense of place and livability of Jamestown and Dunkirk. One of the greatest components to downtown

Chautauqua County, New York

revitalization is the housing stock. Continual improvement of the housing stock and offering a diversity of units is imperative to driving foot traffic to businesses and adding vibrancy during the day, afterhours, and on the weekends.

PART II - LOOKING AHEAD


Capacity to Implement the Strategic Plan

Implementing the Plan will require coordination across all levels of public and private leadership – locally, county-wide, regionally, and at the state and federal levels. While the roles for the CCIDA, key stakeholders, and the Partnership are outlined by goal area in the pages that follow, we acknowledge that the role of the Partnership is quickly developing as the Board and the Advisory Council come together and begin to learn their roles and responsibilities. At this time, the Partnership is still growing its resources with support from County and CCIDA staff.

The current division of tasks in the Plan aims to not overwhelm the Partnership, but instead allow the entity to grow into its role as the face of economic development in the County, and to take on relevant challenges and tasks as they are presented in the future. As the framework for the relationship between the Work Groups, stakeholders, Board, and Advisory Council are solidified, the Work Groups will take on more of an active role in the strategy implementation.

Initiatives are listed by Work Group category on the following pages, and are divided up by proposed Initiative Lead: The Partnership, County Stakeholders, or the CCIDA. The “County stakeholders” group includes a broad range of individuals and organizations that support the County’s economic development goals. It is expected that the roles for each of the partners will be determined within settings like the Work Groups, inter-municipal agreements, and among other existing channels. The objective isn’t to create additional committees or groups, but to refine the focus of already existing groups and harness combined resources to achieve shared goals. We do anticipate that the leads on certain initiatives may switch from the Partnership to the CCIDA, or vice versa, as the plan progresses. The outline provided is meant to be a living document and should be updated on a quarterly basis to reflect progress in implementing the strategies.


STRATEGIC INITIATIVES BY WORK GROUP

Business Development	
Initiative Lead	Initiative
GAME CHANGER – <i>Develop an appropriate site or sites for an Advanced Manufacturing, Science & Research Business Park.</i>	
<p style="text-align: center;"><i>Partnership</i></p> 	1. Inventory available and prospective brownfield and greenfield sites, evaluate site readiness, and determine individual sites and total overall costs.
	2. Bring to market at least 1-2 development ready sites.
	3. Establish a world-class center for advanced production that helps entrepreneurs and existing businesses innovate products and helps establish the county as a center for advanced manufacturing and technology-enabled production.
	4. Promote a campaign around entrepreneurship and business startup. Build off the SBDC's online business academy and FTI's offerings.
	5. Seek dedicated financial resources for small businesses and entrepreneurs in the form of grants and loans.
<p style="text-align: center;"><i>County stakeholders, intermediaries, municipalities, and other partners.</i></p>	6. Work closely with the State of New York, County Department of Planning & Development, and Department of Public Facilities on Capital Projects related to infrastructure to support site development and economic development.
	7. Focus on becoming a magnet for home-based businesses through investments that support digital connectivity.
	8. Explore renewable energy (solar development) as a revenue source.
<p style="text-align: center;"><i>Chautauqua County and County of Chautauqua IDA</i></p>  	9. Develop networking and support structures for contract workers, entrepreneurs, and home-based businesses.
	10. Seek Federal funding to capitalize a new or existing Revolving Loan Fund (RLF) to enhance access to capital for businesses and non-profits as a means to recover from the COVID-19 crisis.
	11. Complete phase II of the Brownfields/Greenfields Strategy and implement its recommendations.
	12. Devote resources to hiring a Brownfields/Property Coordinator.
	13. Secure resources for due diligence, site preparation, and site infrastructure.
	14. Secure additional resources through the County's Capital Project funding process and other sources so the IDA can acquire key sites for development in key areas throughout the County.

Chautauqua County, New York

	15. Improve upon the information that is readily available for prospective developers.
	16. Enhance information available to the development community by building additional GIS layers for brownfield and greenfield site inventory, infrastructure, Opportunity Zones, BOAs, etc.
	17. Develop increased capacity to support new and expanded agribusiness opportunities through the export of products.
	18. Establish an agribusiness initiative to assist food processing businesses, fruit farmers, and grape growers with the export of products to new markets.
	19. Establish an agribusiness initiative that diversifies the agricultural economy, including hops, grains, and hemp.

Workforce Readiness and Development



Initiative Lead	Initiative
<i>GAME CHANGER – Initiate and maintain a people and talent attraction/retention campaign with support and data from workforce and economic development partners and businesses.</i>	
<p style="text-align: center;"><i>Partnership</i></p> 	1. Support County Pre-K–12 education system to meet the standard that all Chautauqua County High School graduates are work ready.
	2. Support all County education providers in meeting the standard that all students receive Critical Thinking and Skills-Based Proficiency Education.
	3. Continue and improve efforts to routinely check in and work with workforce leaders on programs, initiatives, and identify opportunities for collaboration as it pertains to delivery of workforce development programs.
	4. Coordinate with all area training providers to develop new training programs that are linked to Chautauqua County demand occupations.
	5. Include work readiness skill development in all education and training programs offered at all education levels: Pre-K–12, post-secondary, skilled trades, certifications, and credentials, etc.
	6. Support and improve upon the work of the Manufacturing Technology Institute at Jamestown Community College to provide students with highly skilled training in advanced manufacturing equipment.
	7. Coordinate and implement advocacy strategies and messaging with all Partnership members for state and federal funding and resources that are flexible, provided directly to local areas, driven by local area’s unique needs, and aligns with the goals of the Economic Development Strategic Plan.
	8. Coordinate efforts to convene industry workforce round tables and contribute real time information to business retention and expansion initiatives.
	9. Maintain and continuously add to a list of common competencies and foundational skills of work readiness.


Chautauqua County, New York

County stakeholders, intermediaries, municipalities, and other partners.	10. Develop targeted recruitment and marketing strategy for potential new talent, highlighting Chautauqua County's assets to tout a coveted destination.
	11. Engage the Workforce Readiness and Business Development Work Groups to become educated about and coordinate resources to support Chautauqua County Demand Occupations as identified by the Chautauqua Workforce Development Board.
	12. Target skills programs and economic development efforts to high growth sectors as identified on the Chautauqua County Demand Occupation List.
	13. Invest in high-quality childcare.
	14. Continue to take a skills-based approach to workforce development and re-training programs.
	15. Continue existing efforts and develop new innovative strategies to reinforce roadmaps for career pathways to educational institutions and partners. Adapt as needed.
	16. Secure commitment of public educators to connect teachers with businesses so classrooms can better prepare students for high-quality technology jobs.
	17. Continue and improve efforts to connect and engage with the younger generation through social media to showcase the diversity of jobs that are available in Chautauqua County. Partner with post-secondary and K-12 schools on messaging throughout the educational spectrum.
	18. Establish and secure funding for talent attraction programs such as student loan forgiveness, sign on bonuses, home purchasing assistance, etc.
	19. In order to more effectively attract and retain employees and improve health and job satisfaction, work with businesses to improve their workplace culture and employee amenities, resulting in identification as "employers of choice."
20. Work with the County's four institutions of higher education to establish career security accounts to help pay for lifelong learning and career adjustments.	

<h1>Housing Development</h1>	
Initiative Lead	Initiative
GAME CHANGER – Determine housing needs by category and location, and construct 500 new housing units by 2030.	
<p style="text-align: center;"><i>Partnership</i></p> 	1. Continue to reduce duplication of efforts, and improve efficiency and collaboration among partners.
	2. Promote livability of downtown housing to target audiences including young professionals and downsizing Baby Boomers.
	3. Engage the regional real estate community to ensure they are familiar with the resources and assets of Chautauqua County and each municipality.
	4. Promote Chautauqua County as a low cost of living and high quality of life community, where remote work and better lifestyle are achievable.
	5. Establish place-based vouchers and/or allowances for in-county housing after graduation.
	6. Seek land donations for locations well-suited for housing development to reduce development costs.
	7. Assemble land as it becomes available for desirable size for development sites.
<p style="text-align: center;"><i>County stakeholders, intermediaries, municipalities, and other partners.</i></p>	8. Expand rehabilitation programs for existing housing stock to help provide safe, attainable, and affordable housing for families and seniors.
	9. Explore practicality of, and specific action steps necessary to consolidate zoning and building code administration and enforcement for some or all municipalities at the County level.
	10. Promote infill housing in appropriate locations in Dunkirk and Jamestown.
	11. Explore zoning policies that enable property owners to transition vacant second and third floor units into residential units.
	12. Review local municipal codes to ensure housing density is allowed, while encouraging growth in multi-family housing stock.
	13. As housing development is pursued, leverage opportunities to invest in infrastructure (water, sewer, etc.) with the aid of developers.
	14. Integrate elements of placemaking into all discussions as they relate to housing development.
	15. Work closely with employers to determine amenities and price points for housing expected by new or existing employees.



Chautauqua County, New York



	<p>16. Explore incentivizing development within ½ mile of downtown centers to concentrate housing development near commercial nodes.</p>
<p><i>Chautauqua County and County of Chautauqua IDA</i></p>  	<p>17. Update county's Comprehensive Plan to identify optimal sites for housing development that is proximate to core communities with existing infrastructure.</p>
	<p>18. Inventory vacant/underutilized buildings and determine suitability for market rate, mixed-use redevelopment concepts.</p>
	<p>19. Continue to work with partners to remove blight and repurpose vacant lots and dilapidated housing stock.</p>
	<p>20. Monitor Land Bank funding and work with staff and Board of Directors to stimulate additional partnerships, funding sources, and sustainability models.</p>

<h2>Community Development</h2>	
Initiative Lead	Initiative
GAME CHANGER – Produce 10% Growth of Total Tax Revenue in Core Communities Over 7 Years.²	
<p style="text-align: center;"><i>Partnership</i></p> 	1. Inventory and prioritize properties for redevelopment and new build opportunities in core communities, promoting mixed-use development. Coordinate land reuse with Housing Work Group.
	2. Market available properties through multiple channels to developer and site selector networks, as well as local channels.
	3. Explore the practicality and feasibility of consolidated county-wide zoning and code enforcement with a focus on downtown design, walkability, and business friendliness.
	4. Engage local judges, officials and other stakeholders across the county for educational forum and to address priorities in code enforcement.
	5. Develop consistent design guidelines for municipalities.
	6. Inventory vacant/underutilized buildings in dense communities and identify new uses through market analysis, community surveys or other forms of community engagement.
	7. Make downtown revitalization a priority by developing and implementing catalytic projects that advance the community’s vision for revitalization.
	8. Identify incentives consisting of collective resources for improving storefronts and Main Street facades.
	9. Continue to enhance and build on the County’s natural aassets by implementing Local Waterfront Revitalization Programs (LWRPs) and the County’s Greenway Plan to create and enhance waterfront and outdoor attractions.
	10. Support local planning efforts to enhance downtown community spaces, such as Jamestown’s Urban Design Plan, through staff time or funding resources where applicable.

² Tax Revenue includes: Sales tax, occupancy tax, property tax, and other revenue such as permit and license fees.

Chautauqua County, New York

<p><i>County stakeholders, intermediaries, municipalities, and other partners.</i></p>	<p>11. Formalize an e-communication process and open data platform for municipalities to provide guidance on design, development, and growth measures, and community-wide planning efforts.</p>
	<p>12. Integrate downtown improvements and connections to all new development.</p>
	<p>13. Encourage restaurants and services driven by market demand, and align with the county's products, such as farm-to-table and fresh food.</p>
	<p>14. Support municipal sharing for efficiency of services and educate officials in the county's 42 municipalities to gain an understanding of how shared services are linked to improved economic competitiveness.</p>
<p><i>Chautauqua County and County of Chautauqua IDA</i></p>  	<p>15. Continue to expand broadband network through partners such as STW, federal grants, and providers.</p>
	<p>16. Support waterfront development and promote accessible public access with opportunities for commerce, recreation, and social activities.</p>
	<p>17. Develop and expand amenities along recreational trails throughout the County i.e. gas, snack shops, gear shops.</p>
	<p>18. Leverage the county's existing revenues from business operations for reinvestment in community spaces such as sidewalks, landscaping, and infrastructure. Determine if additional district is needed to raise funds, i.e., a Business Improvement District in targeted areas.</p>
	<p>19. More efficiently leverage CCIDA's Underinsured Tax Exemption Policy (UTEP) for adaptive reuse of downtown buildings.</p>
	<p>20. Apply to and secure federal grant for the establishment of a county-wide small business revolving loan fund.</p>

<h2>Tourism and Destination Development</h2>	
Initiative Lead	Initiative
GAME CHANGER – Increase the total number of visitors to the county by 50% within the next 5 years.	
<p style="text-align: center;"><i>Partnership</i></p> 	1. Find additional resources to market Chautauqua County as a safe destination for visitors as the County reopens after COVID-19 and beyond.
	2. Re-tool occupancy tax program to allow funding for project conceptualization, development, and matching funds for leveraging grants.
	3. Promote Lake Erie Wine Country and create a craft beverage trail to encompass the growing brewery/distillery sector.
	4. Develop and/or expand multi-season attractions and experiences that will draw visitors during pre/post summer periods.
	5. Support the National Comedy Center and tactics to drive visitation.
	6. Lead efforts to establish a ground transportation shuttle/network connecting visitor nodes with key area attractions and lodging facilities.
	7. In recognition of Chautauqua Intuition’s economic impact, visitation, and global reach, support their efforts to implement the recently completed strategic plan, 150 Forward.
<p><i>Chautauqua County Visitors Bureau to lead – along with stakeholders, intermediaries, municipalities, and other partners.</i></p>	8. Refresh tourism brand and clearly align messaging with target audience. Provide consistent messaging through all marketing channels.
	9. Contract with a firm to gather and provide up-to-date current and potential audience data to segment target audiences and to utilize in future grant applications.
	10. Continue to actively promote Chautauqua County as a 4-season tourism destination through varied marketing channels.
<p><i>Chautauqua County and County of Chautauqua IDA</i></p> 	11. Establish fund to help support farm-to-table enterprises.
	12. Combine resources with Chautauqua County Visitors Bureau to attract more meetings, conferences, and tournaments in the group size of 200-350 persons. ³

³ As public health and safety allows.

ORGANIZATIONAL

Aside from the above goal areas that forecast how the County will impact economic change, internal organizational changes will support the implementation of the Plan. Recommendations are provided for both the Partnership and for the CCIDA and its relationship with economic development stakeholders engaged in this plan.

Chautauqua County Partnership for Economic Growth

Leadership

1. Re-evaluate the composition of the co-chairs of the Board every two years.
2. Re-evaluate the need for additional staff, such as an Operations Manager and Program & Policy Assistant, and additional capacity for the County's Department of Planning & Development after the initial two years of operations.
3. Adapt the Organizational (staff) plan for the Partnership as roles emerge – define titles, roles, etc. (Economic Development specialists, communications, marketing coordinator, etc.)
4. Jointly pursue State, Federal, and philanthropic resources that support the goals of partners across the region.
5. Establish standing governance committees for the Partnership as needed, including finance, nominations, policy, and programs.
6. Conduct an in-depth assessment of 5-year progress in 2024.
7. Formalize a Memorandum of Understanding with revamped LED Committee at the Northern Chautauqua Community Foundation. Explore a similar dynamic with other foundations, such as the Chautauqua Region Community Foundation.



Work Groups



1. Establish a communications plan to provide continuous and transparent information to stakeholders and interested third parties. This is critical for the Board to brand and market its agenda to constituents inside the county and for external audiences.

Chautauqua County, New York

2. Equip the Work Groups with the latest data to enable them to make informed decisions by establishing a research team within the Partnership.
3. Create a dashboard to measure economic indicators in Chautauqua County. Keep track of approximately a dozen indicators and continue to adapt them as outcomes for the Economic Development Strategy are measured.
 - a. *Potential Indicators:* Jobs, Total Wages, Number of Firms, Annual Average Wages, Unemployment, Tax Base, Sales Tax Collection, Median Household Income, Poverty Rate, Population, Gross Regional Product, Occupancy Tax Receipts, and New Housing Starts.
4. Update the website, including that of each Work Group, to reveal their latest projects assets. Include original and authentic photos of Chautauqua County.

**County of Chautauqua Industrial Development Agency/
Chautauqua County Regional Economic Development Corporation**



1. Determine the long-term future of the Partnership and its relationship with Chautauqua County Regional Economic Development Corporation (CREDC)/County of Chautauqua Industrial Development Agency (CCIDA)
2. Increase staff in the County Division of Economic Development.
3. Formalize a Customer Relationship Management Tool (CRM) for the County's Business Retention and Expansion (BRE) program.
4. Conduct company risk assessments – Identify companies that may be at risk of downsizing, moving operations, closing, etc.
5. Continually improve marketing efforts and create individualized messages for target audiences. (*See examples below*).
6. Seek to add additional funding tools for business in all sectors, including those to assist startups.

MARKETING MATRIX

Audience, Messaging, Channels

External Audiences

Audience	Message + Channels	Channels
<p>Real Estate Executives</p> <p>Location Consultants</p> <p>Targeted Industries</p>	<p>Chautauqua County is a forward thinking, business-friendly community with desirable amenities for families in all stages of life. <i>Channels: 1,2</i></p> <p>Did you know that ice cream manufacturing is 93 times more prevalent in Chautauqua County than anywhere else in the country? YUM. <i>Channels: 1,2,4</i></p> <p>Manufacturing isn't just about surviving in Chautauqua County, it is <i>thriving</i>. From 2018-2019, manufacturing subsectors in furniture, vehicles, and electronics all expanded their workforce. <i>Channels: 1,2,4</i></p> <p>Determine why Arktura, an architectural systems designer-manufacturer, is investing \$7.3 million this year to expand in Chautauqua County this year from the west coast. <i>Channels: 1,2,4</i></p> <p>Think you know what today's manufacturing jobs look like? Think again. <i>(Include pictures from manufacturing positions).</i> <i>Channels: 1,2,4</i></p> <p>Chautauqua County has over 400 brownfield properties that are eligible for federal and state incentives. Let our economic development team find the right match for your company. <i>Channels: 1,2,4</i></p> <p>Chautauqua County recently completed an Economic Development Strategy that recommends game-changing initiatives to improve the economic condition and quality of life for residents. This is a collective effort that contains opportunities for everyone to get involved. Click here to read the plan and to get in touch with the Chautauqua County Partnership for Economic Growth. <i>Channels: 1,2,4</i></p>	<p>1) Website – The “face of economic development” needs to be clearly defined between the Partnership and the IDA. Messaging and visuals used on each website are dependent on the target audiences.</p> <p>2) Social Media – Leverage a County-wide social media audience to feature economic development success stories from entrepreneurs, small businesses, major employers, and residents.</p> <p>3) Newspaper – Work with local media communication channels to highlight the stories that are shared on other channels. Build relationships with reporters that cover local economic development, and invite them to events. Seek to get a re-occurring column that features these stories monthly or bi-monthly (similar to the “Chamber Corner” column).</p> <p>4) Community Organizations – Meet with local organizations and foundations to illustrate how they can communicate positive stories within their organization and share these stories throughout the community.</p>

METRICS AND PROGRESS

The indicators assigned to the implementation of Chautauqua County's Economic Development Strategic Plan measure county-wide economic progress. While the County does not have direct control over each indicator, actions within the plan are intended to generate impactful change, which over time will drive change in the indicators listed by the Work Groups below. This metrics can be supplemented by indicators that are collected by agencies in different sectors. For example, Chautauqua Works may collect information to report to the workforce development and readiness work group regarding the Working Innovation and Opportunity Act (WIOA) that would be valuable to contribution to these metrics. These metrics will be reported annually each June.

Marking Group Metrics

Business Growth

Number of new business starts
Annual % jobs growth (All jobs)
Gross Domestic Product
Total number and value of new development projects
Number of net new shovel-ready sites (County only)
Goods exported out of the county
% of home-based businesses

Data Sources

US Census County Business Patterns
US Census
US Bureau of Economic Analysis
CCIDA
CCIDA
EMSI or Internal Trade Administration
US Census

Workforce Development and Readiness

Graduation rates
% of wage change across all jobs (all sectors)
Number of people who live and work in county
Unemployment rate
Education Attainment Levels (Bachelors, Associates, and Graduate or Professional Degree)

NYS Ed. Dept.
American Community Survey
US Census - On the Map
Bureau of Labor Statistics
US Census

Community Development

Median Household Income
Sales tax collection
Growth of commercial tax base (\$ and %)
Percentage population change
Downtown commercial vacancy rate
Poverty Rate
Access to Broadband Internet

US Census
County
County
US Census
County, municipalities
US Census
FCC / NYS Broadband

Housing

Median home sales price
Median monthly rental rates

US Census
US Census

Chautauqua County, New York

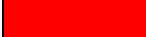


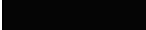
Severely Rent Burdened Households	US Census
Residential building permits issued	HUD
% Rental vs. % homeownership	US Census
% of the population paying >30% of Income on Housing	US Census

Tourism and Destination Development

Tourism related employment growth - (NAICS 71+72)	US Census
Number of county visitors	Chautauqua County Visitors Bureau
Total occupancy tax collected	County

Progress Scale

In addition to the metrics reported on an annual basis, the Partnership will keep a record of the progress of each initiative listed in the Plan. The scale below will visually represent the progress and draw attention to items that are not progressing as anticipated. For every yellow or red box, the Partnership and respective Work Group will discuss that initiative to determine whether the initiative is still relevant, what the barriers are to implementation, and what role the Work Group can play in advancing the initiative. The Excel file that contains the matrix and progress table can be used frequently to keep records of conversations and project updates.

	No Progress
	Some Progress
	Actively Progressing
	Canceled or Abandoned

Chautauqua County, New York

ACKNOWLEDGEMENTS

A special thank you goes out to a multitude of funders, partners, community stakeholders, staff, and project consultants that helped to make this plan a reality. We appreciate your involvement, collaboration, and commitment to economic growth in Chautauqua County.

Funding Partners



Chautauqua County

County of Chautauqua Industrial Development Agency (CCIDA)

Chautauqua Region Economic Development Corporation (CREDC)

Northern Chautauqua Community Foundation

Ralph C. Wilson, Jr. Foundation

Chautauqua County Partnership for Economic Growth Board of Directors

Board Co-Chairs

Matt Churchill | Founder and President, Water Street Brass

Mark Geise | Deputy County Executive for Economic Development and CEO, Chautauqua County and CCIDA

Board Members

Sham Bahgat | Managing Director, Bahgat & Laurito-Bahgat CPA

Courtney Curatolo | Director, Small Business Development Center at Jamestown Community College

Dr. Daniel DeMarte | President, Jamestown Community College

Greg Edwards | Chief Executive Officer, Gebbie Foundation

Don McCord | Director of the Division of Planning and Community Development, Chautauqua County

Mark Odell | Chairman of the Planning and Economic Development Committee, Chautauqua County Legislature

Gina Paradis | Executive Director, Chautauqua County Land Bank Corporation

Todd Trantum | President and CEO, Chautauqua County Chamber of Commerce and MAST

Hon. Paul Wendel | County Executive, Chautauqua County

Chautauqua County, New York

Chautauqua County Partnership for Economic Growth Advisory Council**Advisory Council Co-Chairs****Sham Bahgat** | Managing Director, Bahgat & Laurito-Bahgat CPA**Greg Edwards** | Chief Executive Officer, Gebbie Foundation**Advisory Council Members****Jay Baker** | President, Jamestown Plastics**Matt Churchill** | Founder and President, Water Street Brass**Diane Hannum** | Executive Director, Northern Chautauqua Community Foundation**Michael Hill** | President, Chautauqua Institution**Tory Irgang** | Executive Director, Chautauqua Region Community Foundation**Lori Jafargian** | Human Resource Director, Cummins Inc.**Richard Johnson** | Retired Partner, JM&A**Dan Reininga** | President and Chief Executive Officer, Lake Shore Savings Bank**Rich Ryan** | Director of Development, National Comedy Center**Alexis Singleton** | Co-owner, El Greco Woodworking, Inc.**Partners, Stakeholders, and Champions****Zach Agett** | Marketing & Events Manager, Jamestown Renaissance Corporation**Nathan Aldrich** | Special Projects Coordinator/Economic Development Manager | Chautauqua County/CCIDA**Jon Anderson** | Deputy Commissioner of Health and Human Services | Chautauqua County**Hans Auer** | Senior Vice President, UBS Wealth Management**Chuck Bell** | Vice President, H. Sicherman/the Harrison Studio**Brad Bentley** | Director of Public Facilities, Chautauqua County**Martha Bills** | Supervisor, Town of Westfield**Hon. George Borrello** | Senator, New York State**Kelly Borrello** | Owner & General Manager, Sunset Bay Beach Club**Jennifer Borrello** | Confidential Secretary (former), Office of the Chautauqua County Executive**Tiffany Borst** | Board Member, Chautauqua-Cattaraugus County Board of Realtors

Chautauqua County, New York

Rebecca Brumagin | Supervisor, Town of Mina

Don Burdick | LED Committee Member, Northern Chautauqua Community Foundation

Linda Burns | Business Development Manager, County of Chautauqua Industrial Development Agency

Jehuu Caulcrick | Coordinator (former), Dream It Do It WNY

Tracy Collingwood | Director of Career Development, State University of New York at Fredonia

Chuck Cornell | Director, Fredonia Technology Incubator

Vince DeJoy | Director of Development (former), City of Jamestown

Richard Dixon | Chief Financial Officer, County of Chautauqua Industrial Development Agency

Irene Dobies | Director (former), Small Business Development Center at Jamestown Community College

Holger Ekanger | Vice President for Workforce Readiness, Jamestown Community College

Doug Essek | Mayor, Village of Fredonia

Joshua Freifeld | Executive Director, Chautauqua Home Rehabilitation & Improvement Corporation (CHRIC)

Amanda Gallagher | Administrative Aide, Office of the Chautauqua County Executive

Craig Garass-Johnson | Business Development Coordinator, Jamestown Board of Public Utilities

Katie Geise | Executive Director, Chautauqua Works/Workforce Investment Board

Hon. Andrew Goodell | Assemblyman, New York State

Journey Gunderson | Executive Director, National Comedy Center

Gary Hahn | Director of Marketing & Communications, National Comedy Center

Patty Hammond | LED Committee Coordinator, Northern Chautauqua Community Foundation

Justin Hanft | Director (former), Chautauqua County Education Coalition

Dan Heitzenrater | Executive Assistant, Office of the Chautauqua County Executive

Craig Hinderleider | General Manager, Northwest Arena

Randy Holcomb | Mayor, Village of Lakewood

Steve Holt | Vice President, Howard Hanna Holt Real Estate

Kristy Kathman | Deputy Director (former), Jamestown Renaissance Corporation

Kevin Kearns | VP of Engagement & Economic Development, State University of New York at Fredonia

Richard Ketcham | Chairman, Northern Chautauqua Community Foundation

Tom Kucharski | President and CEO, Invest Buffalo Niagara

Josiah Lamp | Director of Housing & Community Development, Chautauqua Opportunities, Inc.

Chautauqua County, New York

- Dave Leathers** | General Manager, Jamestown Board of Public Utilities
- Jeanette Lo Bello** | Administrative Assistant, County of Chautauqua Industrial Development Agency
- Keith Martin** | Executive Director, Northwest Arena
- Mary Maxwell** | Coordinator of Housing (former), Jamestown Renaissance Corporation
- Amanda Mays** | Regional Director, Empire State Development
- Matt Mazgaj** | Associate (former), Phillips Lytle, LLP
- Monica Mazur** | Executive Director, Lake Erie Wine Country
- Patrick McLaughlin** | Supervisor, Town of Ellicott
- Mike Metzger** | VP of Finance and Administration, SUNY Fredonia
- Peter Miraglia** | Executive Director (former), Jamestown Renaissance Corporation
- Kristine Morabito** | Business Development Manager, County of Chautauqua Industrial Development Agency
- Emily Morris** | Vice President of Marketing & Communications, Chautauqua Institution
- Andrew Nixon** | Executive Director, Chautauqua County Visitors Bureau
- Kris Olson** | Owner, PropertyMatch USA
- David O'Rourke** | Chief Executive Officer, Erie 2 – Chautauqua – Cattaraugus BOCES
- Daniel Pacos** | Supervisor, Town of Pomfret
- Tim Piazza** | Outreach Coordinator, Manufacturers Association of the Southern Tier
- Carol Rasmussen** | Business Development Manager, County of Chautauqua Industrial Development Agency
- Aaron Resnick** | Executive Director (former), Westfield Development Corporation
- Wilfred Rosas** | Mayor, City of Dunkirk
- Angela Rossi** | Deputy Regional Director, Empire State Development
- Dave Rowe** | Code Enforcement Officer, Town of Ellicott
- Brenda Salemme** | Director of Admissions, Jamestown Business College
- John Sayegh** | Vice President (former), Jamestown Community College
- Lisa Schmidtfrerick-Miller** | Healthy Communities Consultant, Chautauqua County
- Christine Schuyler** | Commissioner of Social Services & Public Health Director, Chautauqua County
- Kristofor Sellstrom** | Co-Chairman, Jamestown Renaissance Corporation
- Ken Shearer** | Mayor, Village of Mayville
- Harry Sicherman** | President, H. Sicherman/the Harrison Studio

Chautauqua County, New York

Monica Simpson | Economic Development Specialist, Chautauqua County Partnership for Economic Growth

Diego Sirianni | Program Specialist II, Empire State Development

Henry Sirois | General Manager, Chautauqua Harbor Hotel

Bill Smock | Principal, P-Tech Academy

Beth Starks | Coordinator of Childhood Education, Jamestown Community College

Rosemarie Strandburg | Executive Assistant, County of Chautauqua Industrial Development Agency

Kayla Strandburg | Controller, County of Chautauqua Industrial Development Agency

Mo Sumbundo | Assistant Regional Director, Empire State Development

Edward Sundquist | Mayor, City of Jamestown

Crystal Surdyk | Director of Development, City of Jamestown

Jeff Swanson | Code Enforcement Officer, Town of Busti

Linda Swanson | Executive Director, Ralph C. Sheldon Foundation, Inc.

Grant Umberger | Director of Workforce Readiness, Jamestown Community College

John H. Walker II | Supervisor, Town of Sheridan

John Jay Warren | LED Committee Member, Northern Chautauqua Community Foundation

Johnathan Weston | Owner, Panama Rocks

Tom Whitney | Executive Director, Southern Tier Environments for Living, Inc.

Stephanie Wright | Economic Development Coordinator, City of Jamestown

Rebecca Wurster | Director of Development, City of Dunkirk

Richard Zink | Executive Director, Southern Tier West Regional Planning and Development Board

Chautauqua County, New York

PROJECT TEAM

About Camoin 310

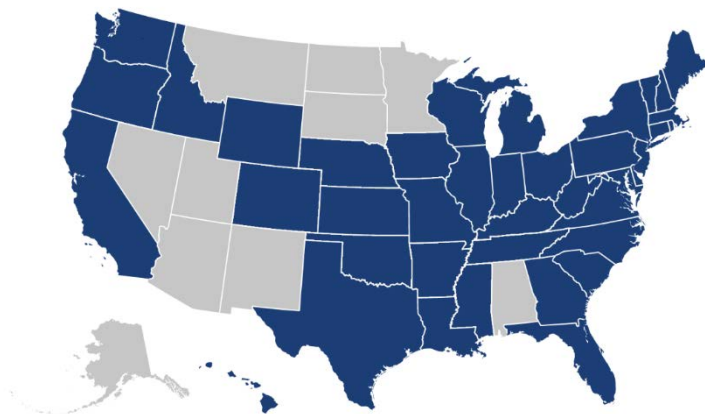
Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has had the opportunity to serve EDOs, as well as local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus), and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 32 states and has garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategourismies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociate).

THE PROJECT TEAM

Dan Gundersen
Senior Vice President, Project Principal

Alex Tranmer
Senior Project Manager, Project Manager

Jessica Ulbricht
Analyst, Project Staff

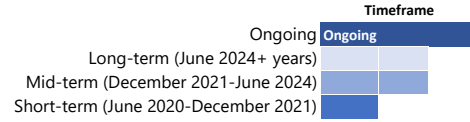
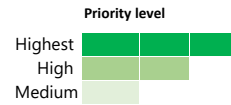


Chautauqua County, New York

APPENDIX A: ACTION PLAN MATRIX

Chautauqua County Economic Development Strategy

Published: June 2020



BUSINESS DEVELOPMENT						
Initiative Lead	Initiative	Priority	Timeframe	Partners	Potential Funding/Resources	
<i>Partnership</i>	1. Inventory available and prospective brownfield and greenfield sites, evaluate site readiness, and determine individual site and total overall costs.	Highest	Short-term			
	2. Bring to market at least 1-2 development ready sites.	Highest	Short-term			
	3. Establish a world-class center for advanced production that helps entrepreneurs and existing businesses innovate products and helps establish the county as a center for advanced manufacturing and technology-enabled production.	High	Mid-term		CCIDA, ESD, IBN, SBDC, SBDC	BOA program resources, ESD
	4. Promote a campaign around entrepreneurship and business startup. Build off the SBDC's online business academy and FTI's offerings.	High	Short-term			
	5. Seek dedicated financial resources for small business and entrepreneurs in the form of grants or loans.	High	Short-term			
<i>Partners</i>	6. Work closely with the State of New York, County Department of Planning & Development, and Department of Public Facilities on Capital Projects related to infrastructure to support site development and economic development.	High	Mid-term		NYS, CC Department of Planning and Development, Depart. Of Public Facilities, SBDC	Private sector, NYS Broadband Program Office, CODI, USDA ReConnect, Rural Digital Opportunity Fund
	7. Focus on becoming a magnet for home-based businesses through investments that support digital connectivity.	High	Short-term			
	8. Explore renewable energy (solar development) as a revenue source.	Medium	Mid-term			
	9. Develop networking and support structures for contract workers, entrepreneurs, and home-based businesses.	Medium	Mid-term			
<i>Chautauqua County and County of Chautauqua IDA</i>	10. Seek Federal funding to capitalize a new or existing Revolving Loan Fund (RLF) to enhance access to capital for businesses and non-profits as a means for COVID-19 economic recovery.	Highest	Short-term			
	11. Complete phase II of the Brownfields/Greenfields Strategy and implement its recommendations.	High	Mid-term			
	12. Devote resources to hiring a Brownfields/Property Coordinator.	High	Mid-term			
	13. Secure resources for due diligence, site preparation, and site infrastructure.	High	Short-term			
	14. Secure additional resources through the County's Capital Project funding process and other sources so the IDA can acquire key sites for development in key areas throughout the County.	High	Short-term		Cornell Co-operative Extension, DOS, State Book Intl.	BOA program resources, EPA - OLEM, National Grid
	15. Improve upon the information that is readily available for prospective developers.	High	Mid-term			
	16. Enhance information available to the development community by building additional GIS layers for Brownfield and greenfield site inventory, infrastructure, Opportunity Zones, BOAs, etc.	Medium	Mid-term			
	17. Develop capacities to support new and expanded agribusiness opportunities through the export of products.	Medium	Mid-term			
	18. Establish an agribusiness initiative to assist food processing businesses, fruit farmers, and grape growers with export of products to new markets	Medium	Mid-term			
19. Establish an agribusiness initiative that diversifies the agricultural economy, including hops, grains, and hemp.	Medium	Mid-term				

WORKFORCE READINESS AND DEVELOPMENT

Initiative Lead	Initiative	Priority	Timeframe	Partners	Potential Funding/Resources
<i>Partnership</i>	1. Support County Pre-K-12 education system to meet the standard that all Chautauqua County High School graduates are work ready.	High	Ongoing	Chautauqua Works, CCEC, BOCES, JCC, Chautauqua County, WIB Partners	ESD Workforce Development Initiative, Department of Labor, Department of Agriculture Staff time
	2. Support all County education providers to meet the standard that all students receive Critical Thinking and Skills-Based Proficiency Education.	High	Ongoing		
	3. Continue and improve efforts to routinely check in and work with workforce leaders on programs, initiatives and identify opportunities for collaboration as it pertains to delivery of workforce development programs.	High	Ongoing		
	4. Coordinate with all area training providers to develop new training programs that are proposed from feasibility study and linked to Chautauqua County demand occupations.	Medium			
	5. Include work readiness skill development in all education and training programs offered at all education levels: Pre-K-12, post-secondary, skilled trades, certifications and credentials, etc.	Medium			
	6. Support and improve upon the work of the Manufacturing Technology Institute at Jamestown Community College to provide students with highly skilled training in advanced manufacturing equipment.	Medium			
	7. Coordinate and implement advocacy strategies and messaging with all Partnership members for state and federal funding and resources that are flexible, provided directly to local areas, driven by local area's unique needs, and aligns with the goals of the Economic Development Strategic Plan.	Medium			
	8. Coordinate efforts to convene industry workforce round tables and contribute real time information to business retention and expansion initiatives.	Medium			
	9. Maintain and continuously add to a list of common competencies and foundational skills of work readiness.	Low	Ongoing		
<i>Partners</i>	10. Develop targeted recruitment and marketing strategy for potential new talent highlighting Chautauqua County's assets creating a coveted destination.	High		Chautauqua Works, CCEC, BOCES, JCC, Chautauqua County, WIB Partners, Chamber	ESD Workforce Development Initiative, Department of Labor, Department of Agriculture
	11. Engage the Workforce Readiness and Business Development Working Groups to recognize and coordinate resources to support Chautauqua County Demand Occupations as identified by the Chautauqua Workforce Development Board.	High			
	12. Target skills programs and economic development efforts to high growth sectors as identified on the Chautauqua County Demand Occupation List.	High			
	13. Invest in high quality childcare.	High			
	14. Continue to take a skills-based approach to workforce development and re-training programs.	High	Ongoing		
	15. Continue efforts and develop innovative strategies to reinforce roadmaps for career pathways to educational institutions and partners. Adapt as needed.	Medium	Ongoing		
	16. Secure commitment of public educators to connect teachers with businesses so classrooms better prepare students for high technology jobs.	Medium			
	17. Continue and improve efforts to connect and engage with the younger generation through social media to showcase the diversity of jobs that are available in Chautauqua County. Partner with post-secondary and K-12 schools on messaging throughout the educational spectrum.	Medium			
	18. Establish and secure funding for talent attraction programs such as student loan forgiveness, sign on bonus, home purchase assistance, etc.	Medium			
	19. To retain employees and improve health and satisfaction, work with businesses to improve workplace culture and amenities resulting in identification as "employers of choice".	Low			
	20. Work with the County's four institutions of higher education to establish career security accounts to help pay for lifelong learning and career adjustments.	Low			

HOUSING DEVELOPMENT

Initiative Lead	Initiative	Priority	Timeframe	Partners	Potential Funding/Resources
<i>Partnership</i>	1. Continue to reduce duplication of efforts and improve efficiency and collaboration among partners.	High	Ongoing	Neighborhood organizations, employers, Chautauqua Cattaraugus Board of Realtors	Staff time
	2. Promote livability of downtown housing to target audiences: young professionals and downsizing Baby Boomers.	High			
	3. Engage regional real estate community to make sure they are familiar with the resources and assets of Chautauqua County and each municipality.	High			
	4. Promote Chautauqua County as a low cost of living and high quality of life community, where remote work and better lifestyle are achievable.	Medium			
	5. Establish place-based vouchers or allowance for in county housing after graduation.	Low			
	6. Seek land donations for locations well-suited for housing development to drive down development costs.	Low			
	7. Assemble land as it becomes available into desirable size for development.	Low			
<i>Partners</i>	8. Build out rehabilitation programs for existing housing stock to help provide safe, attainable, affordable, housing for families and seniors.	High		Chautauqua Cattaraugus Board of Realtors, JHA, DHA, CODE, COI, CCLBC, Municipalities, Gebbie Foundation, CHRIC, Employers, Neighborhood Associations	USDA, Consolidated Funding Application, LISC partners, Ralph Wilson Foundation, Lead and Health Homes Technical Studies, USDA - Rural Housing Preservation Grants
	9. Explore practicality of, and specific action steps necessary to consolidate zoning and building code administration and enforcement for some or all municipalities, at the County level.	High			
	10. Promote infill housing in appropriate locations in Dunkirk and Jamestown.	High	Ongoing		
	11. Explore zoning policies that enable properties to transition vacant second and third floor units into residential units.	High			
	12. Review local municipal codes to ensure housing density is allowed and encourages growth in the multi-family housing stock.	Medium			
	13. As housing development is proposed, leverage opportunity to invest in infrastructure (water, sewer, etc.) with aid of developer.	Medium	Ongoing		
	14. Integrate elements of placemaking into all discussions of housing development.	Medium	Ongoing		
	15. Work closely with employers to determine amenities and price points expected by new or existing employees.	Medium	Ongoing		
16. Explore incentivizing development within ½ mile from downtown centers to concentrate housing development to commercial nodes.	Low	Ongoing			
<i>County of Chautauqua IDA</i>	17. Update county's Comprehensive Plan to identify optimal sites for housing development that is proximate to core communities with existing infrastructure.	High		Chautauqua County Planning and Economic Development, Neighborhood Groups, Housing Agencies	ESD - Strategic Planning and Feasibility Studies, LISC - Partners
	18. Inventory vacant/underutilized buildings and determine suitability for market rate, mixed-use redevelopment concepts.	High			
	19. Continue to work with partners to remove blight and repurpose vacant lots or dilapidated housing stock.	Medium			
	20. Monitor Land Bank funding and work with staff and Board of Directors to stimulate additional partnerships and sustainability models.	Low	Ongoing		

COMMUNITY DEVELOPMENT

Initiative Lead	Initiative	Priority	Timeframe	Partners	Potential Funding / Resources
<i>Partnership</i>	1. Inventory and prioritize properties for redevelopment and new build opportunities in core communities, promoting mixed-use development. Coordinate land reuse with Housing Working Group.	High	Ongoing	Municipal code enforcement representatives, Land Bank, Jamestown Renaissance Corporation, Revitalize Dunkirk, municipal staff	Staff time NYSCC
	2. Market available properties through multiple channels to developer and site selector networks, as well as local channels.	High			
	3. Identify incentives of collective resources for improving storefronts and Main Street facades.	High			
	4. Engage local judges, officials and other stakeholders across the county for educational forum and to address priorities in code enforcement.	Medium			
	5. Develop consistent design guidelines for municipalities.	Medium			
	6. Inventory vacant/underutilized buildings or spaces in dense communities and identify new uses through market analysis, community surveys or other forms of community engagement.	Medium	Ongoing		
	7. Make downtown revitalization a priority by developing and implementing catalytic projects that advance the community's vision for revitalization.	Medium	Ongoing		
	8. Explore the practicality and feasibility of consolidated county-wide zoning and code enforcement with a focus on downtown design, walkability, and business friendliness.	Medium			
	9. Continue to enhance and build on the County's natural assets by implementing Local Waterfront Revitalization Programs (LWRPs) and the County's Greenway Plan to create and enhance waterfront and outdoor attractions.	Medium			
	10. Support local planning efforts to enhance downtown community spaces, like Jamestown's Urban Design Plan, through staff time or funding resources were applicable.	Low	Ongoing		
<i>Partners</i>	11. Formalize an e-communication process, and open data platform, for municipalities to provide advice and guidance on design, development, and growth measures, others can benefit from best practices, lessons learned, and community-wide planning followed by the more resourced communities.	High		CC Division of Planning and Community Development, CBRDC, DLDC, Community Foundations, Municipalities, Regional Partners	Consolidated Funding Application, USDA - Rural Community Development Initiative, NYSCA
	12. Support municipal sharing for efficiency of services and educate officials in the county's 42 municipalities to understand how shared services are linked to improved economic competitiveness.	High	Ongoing		
	13. Encourage restaurants and services driven by market demand and align with the county's products, like farm-to-table and fresh food.	Medium	Ongoing		
	14. Integrate downtown improvements or connections to all new development.	Low	Ongoing		
<i>County of Chautauqua IDA</i>	15. Continue to expand broadband network through partners like STW, federal grants, and providers.	High		STW, Municipal Planning Departments	USDA- Revolving Fund Program
	16. Leverage the county's existing revenues from business operations for reinvestment in community spaces like sidewalks, landscaping, and infrastructure. Determine if additional district is needed to raise funds ie a Business Improvement District in targeted areas.	High			
	17. Apply to federal grant source for county-wide small business revolving loan fund.	High			
	18. Leverage CCIDA's UTEP for adaptive reuse.	Medium			
	19. Support waterfront development and promote accessible public access with opportunities for commerce, recreation and social activities.	Medium			
	20. Develop and expand amenities along recreational trails throughout the County ie gas, snack shops, gear shops.	Low			

TOURISM AND DESTINATION DEVELOPMENT

Initiative Lead	Initiative	Priority	Timeframe	Partners	Potential Funding/Resources
<i>Partnership</i>	1. Find additional resources to market Chautauqua County as a safe destination for travels as the County reopens after COVID-19 and beyond.	High	Ongoing	Consultant, CCVB, Chamber	ESD - Market NY, Staff time
	2. Retool occupancy tax program to allow funding for project conceptualization, development, and matching funds for leveraging grants.	Medium			
	3. Promote Lake Erie Wine Country and create a craft beverage trail to encompass the growing brewery/distillery sector.	Medium			
	4. Develop or expand multi-season attractions and experiences that will draw visitors during pre/post summer periods.	Low			
	5. Support the National Comedy Center and tactics to drive visitation.	Low			
	6. Lead efforts to establish a ground transportation shuttle/network connecting visitor nodes with key area attractions and lodging facilities.	Medium			
<i>Partners</i>	7. Refresh tourism brand and clearly align messaging with target audience. Provide consistent messaging through all marketing channels.	High		Consultant, CCVB, Chamber, Chautauqua Institution	ESD- Market NY
	8. Contract a firm to gather and provide up-to-date audience and potential audience data for to segment target audiences and to use in upcoming grant applications.	High			
	9. Continue to actively promote Chautauqua County as a 4-season tourism destination through marketing channels.	Medium	Ongoing		
	10. Establish fund to help support farm-to-table enterprises.	Low			
<i>County of Chautauqua IDA</i>	11. Combine resources with Chautauqua County Visitor Bureau to attract more meetings, conferences, and tournaments in the group size of 200-350 persons.	Low		CCVB	Staff time

Partner Legend

Chamber	Chautauqua County Chamber of Commerce
CI	Chautauqua Institution
Community Foundations	Northern Chautauqua Community Foundation, Chautauqua Region Community Foundation
DOS	Department of State - includes funding under:
	Local Waterfront Revitalization Program
	Brownfield Opportunity Program
	Local Government Efficiency Program
EPA - OLMEM	Environmental Protection Agency - Office of Land Management and Emergency Maintenance
ESD - includes funding under:	Empire State Development - includes funding under:
	Strategic Planning and Feasibility Studies
	Market New York
	Economic Growth Initiative
HCR	Office of Homes and Community Renewal - includes funding under:
	Consolidated Block Grant Funding
	New York Main Street Funding
JCC	Jamestown Community College
	Lead and Health Homes Technical Studies - Grant Program
LED Committee	Local Economic Development Committee
LISC	Local Initiatives Support Corporation
National Grid	National Grid - includes funding under:
	CleanTech Incubation
	Main Street/Commercial District Revitalization
	Strategic Economic Development Program (Marketing-focus)
	Site Development Programs
NYSCA	New York State Council on the Arts
NYSCC	New York State Canal Corporation
NYSERDA	New York State Energy Research and Development Authority
OPRHP	Office of Parks, Preservation, and Heritage
USDA	United State Department of Agriculture- rural housing preservation grants
	Rural Housing Preservation Grants

SUNY	State University of New York Fredonia, Empire State College
	SUNY Fredonia Technology Incubator
CCVB	Chautauqua County Visitors Bureau
WIB	Workforce Investment Board, Chautauqua Works
CCEC	Chautauqua County Education Coalition
COI	Chautauqua Opportunities Inc.
BOCES	Board of Cooperative Educational Services
WIB Partners	http://www.chautauquaworks.com/zen.asp?mod=article&actid=134
CCCC	Chautauqua County Childcare Council
CBRDC	Chadwick Bay Regional Development Corporation
DLDC	Dunkirk Local Development Corporation

Chautauqua County, New York

APPENDIX B: ECONOMIC BASE ANALYSIS

PREPARED FOR:

Chautauqua Region Economic Development
Corporation (CREDC)

ECONOMIC PROFILE

CHAUTAUQUA COUNTY, NY

REVISED FEBRUARY 2020

PREPARED BY:



120 West Avenue, Suite 303
Saratoga Springs, NY 12866
518.899.2608
www.camoinassociates.com

ABOUT CAMOIN 310

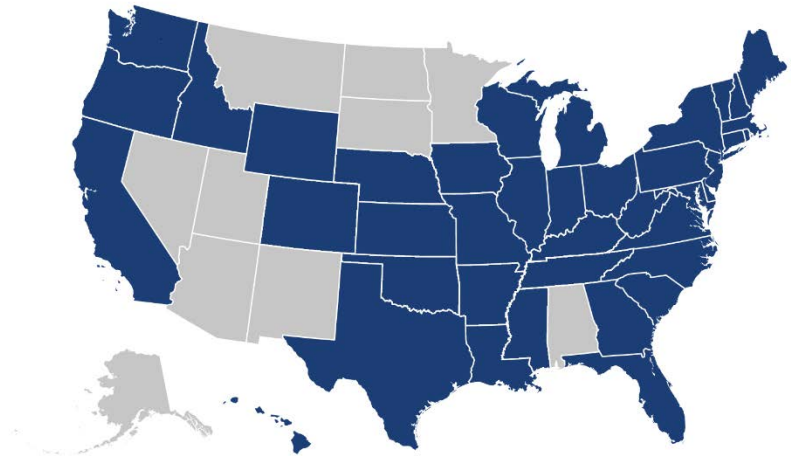
Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has had the opportunity to serve EDOs as well as local and state governments from Maine to California; corporations and organizations that including Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 32 states and garnered attention from national media outlets including Marketplace (NPR), Forbes magazine, The New York Times and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociate).

THE PROJECT TEAM

Dan Gundersen
Senior Vice President, Project Principal

Alex Tranmer
Senior Project Manager, Project Manager

Jessica Ulbricht
Analyst, Project Staff



Contents

Findings Snapshot	48
Business Development.....	48
Workforce Readiness.....	49
Community Development	49
Housing Development.....	50
Tourism & Quality of Life.....	50
Introduction	51
Data Sources	51
Study Regions.....	52
Socioeconomic Analysis.....	52
Population.....	52
Households & Income	56
Educational Attainment	57
Unemployment Rates.....	58
Race/Ethnicity.....	59
Market Segmentation Analysis.....	59
Commuting Patterns & Remote Workers	61
Migration Flows	62
Tax Comparison.....	63
Industry Analysis.....	65
Employment by Sector (2-Digit NAICS)	65
Regional Comparison	69
Subregion Comparison in Western New York.....	74
Gross Regional Product by Sector (2-Digit NAICS)	81
Top Industries (4-Digit NAICS)	83
Top Occupations	87
Talent Attraction.....	92
Employment Concentration.....	92
Job Growth by Establishment Stage.....	93
Entrepreneurial Ecosystems	95
Top Chautauqua County Employers.....	96

Chautauqua County, New York

Tourism Industry	97
Real Estate Trends	100
Professional/Office Market.....	100
Industrial Market	102
Residential Market.....	103
Summary of opportunities, challenges and recommendations	108
Attachment A: Data Sources	109

Table of Figures

Figure 1: Total Population by Age Cohort, 2019	53
Figure 2: Chautauqua County Total Population by Age Cohort, 2000-2019	54
Figure 3: Chautauqua County Population	55
Figure 4: Households by Income Cohort, 2019.....	56
Figure 5: Educational Attainment of Population Ages 25+, 2019	57
Figure 6: Share of Population by Race and Hispanic Origin, 2019.....	59
Figure 7: Total Net Migration Flows, Chautauqua County	63
Figure 8: Chautauqua County Employment by Sector, 2019	65
Figure 9: Chautauqua County Government Employment by Sector, 2019.....	68
Figure 10: 2019 Average Earnings, Regional Comparison	80
Figure 11: Percent of Geography's Gross Regional Product	81
Figure 12: Traveler Spending	99

Tables of Tables

Table 1: Population, 2010-2024	52
Table 2: Chautauqua County Population by Age Cohort, 2000-2024	54
Table 3: Median Age, 2019-2024	55
Table 4: Households, 2010-2024	56
Table 5: Median Household Income, 2019-2024.....	56
Table 6: In-Demand Skills in Chautauqua County Job Postings	57
Table 7: Unemployment Rate, 2019*	58
Table 8: County of Chautauqua Tapestry Segments.....	60
Table 9: Top 10 Places of Residence for Chautauqua County Workers.....	61
Table 10: Top 10 Places of Work for Chautauqua County Residents	61
Table 11: Mean Commute Time	62
Table 12: Property Tax Rate Comparison, 2018	63
Table 13: Employment by Sector, 2-Digit NAICS, Chautauqua County.....	66

Chautauqua County, New York

Table 14: Employment by Historical Percent Change.....	67
Table 15: Employment by Sector, 2-Digit NAICS, Western NY	70
Table 16: Employment by Sector, 2-Digit NAICS, New York	71
Table 17: Employment by Historical Percent Change, Western NY	72
Table 18: Employment by Historical Percentage Change, New York.....	73
Table 19: Subregion Comparison - WNY Counties	74
Table 20: Subregion Comparison - WNY Counties.....	75
Table 21: 2019 Location Quotient by Sector, 2-Digit NAICS	77
Table 22: 2019 Employment Share by Sector, Regional Comparison.....	78
Table 23: 2009-2019 Percent Change in Employment, Regional Comparison	79
Table 24: Gross Regional Product by 2-Digit Sector.....	82
Table 25: Top 25 Industries by Employment, 4-Digit NAICS, Chautauqua County	84
Table 26: Top 25 Industries by Employment, 4-Digit NAICS, Western NY	85
Table 27: Top 25 Industries by Employment, 4-Digit NAICS, New York	86
Table 28: Top 25 Occupations by Employment, 3-Digit SOC, Chautauqua County	87
Table 29: Top 15 Occupations by Replacement Jobs, 3-Digit SOC, Chautauqua County.....	88
Table 30: Top 25 Occupations by Employment, 3-Digit SOC, Western NY.....	89
Table 31: Top 25 Occupations by Employment, 3-Digit SOC, New York	90
Table 32: Average Hourly Earnings by Geography of Top 25 Chautauqua County Occupations.....	91
Table 33: Remote Workers	92
Table 34: Concentration of Employment, 2019, Chautauqua County	93
Table 35: Jobs by Stage of Establishment, Chautauqua County.....	94
Table 36: Jobs by Stage of Establishment, Buffalo-Cheektowaga-Niagara Falls MSA.....	94
Table 37: Jobs by Stage of Establishment, New York.....	94
Table 38: Buffalo-Cheektowaga-Niagara Falls MSA Venture Capital Deals.....	95
Table 39: Buffalo-Cheektowaga-Niagara Falls Metro Venture Capital Deals by Sector	95
Table 40: Chautauqua County Employers with Over 500 Employees	96
Table 41: Chautauqua County Tourism Industry.....	97
Table 42: Western New York Tourism Industry	98
Table 43: Tourism Impacts.....	98
Table 44: Employment Growth in Office-Utilizing Industries, Chautauqua County.....	100
Table 45: Employment Growth in Office-Utilizing Industries, Western NY	101
Table 46: New Demand for Office Space	101
Table 47: Employment Growth in Industrial Industries, Chautauqua County.....	102
Table 48: Employment Growth in Industrial Industries, Western NY	102
Table 49: Chautauqua County Industrial Properties for Sale or Lease	103
Table 50: Housing Stock Summary	104
Table 51: Change in Number of Housing Units	104
Table 52: Vacant Units by Status, 2017.....	105
Table 53: Housing Units by Units in Structure	106
Table 54: Housing Units by Year Structure Built.....	106
Table 55: Chautauqua County Residential Building Permits	106
Table 56: Owner-Occupied Housing Units by Value, 2019.....	107
Table 57: Median Rent.....	108

Chautauqua County, New York

This page intentionally left blank.

FINDINGS SNAPSHOT

As part of the initial research to produce an economic development strategy for the Chautauqua Region Economic Development Corporation (CREDC), Camoin 310 gathered and analyzed economic data to fully understand demographic and economic conditions in Chautauqua County. This information will be used to inform the subsequent steps of the strategic planning process, including project identification and strategy development. What follows is a summary of the findings from this analysis, categorized by relevance to the working groups participating in this planning process.

Business Development

- ◆ **While Western New York and New York State demonstrated positive economic trends in the last decade, Chautauqua County did not typically show the same positive gains.** Chautauqua County is home to approximately 53,000 jobs and lost about 4,500 jobs over the last ten years, a decrease of about 8%. At the same time, the Western New York Region added jobs at a rate of 2% and New York State added jobs at a rate of 12%.
- ◆ **Government is the largest sector in Chautauqua County, with 9,834 jobs. The majority of these government jobs are found in the Education and Hospitals subsector, followed by Local Government.** The top five industry sectors by employment include Government (9,834 jobs or 19% of all jobs), Manufacturing (8,913 jobs or 17% of all jobs), Health Care and Social Assistance (8,015 jobs or 15% of all jobs), Retail Trade (6,328 jobs or 12% of all jobs), and Accommodation and Food Services (4,901 jobs or 9% of all jobs). 50% of the County's government jobs are attributed to education and hospitals.
- ◆ **Manufacturing is critical to the county's economy.** Based on 2019 employment figures, Manufacturing is 2.14 times more concentrated in Chautauqua County relative to the rest of the country. It comprises 17% of total jobs in the county and contributes to about a quarter of the county's total Gross Regional Product, the single largest proportion out of any industry. This concentration of industry presents opportunities to be built upon on. Yet, as the manufacturing sector continues to evolve, further downturns in the industry would have significant ramifications on the entire county's economic activity. **Continuing to innovate manufacturing production, meeting the latest market demand, and ensuring that producers have access to quality workforce to be productive is vital to the future of the county's economy.**
- ◆ **Between 2009 and 2019, the Agriculture, Forestry, Fishing, and Hunting (NAICS 11) industries along with the Arts, Entertainment and Recreation (NAICS 71) industries are the only industries that have experienced positive job growth, adding 52 and 81 jobs respectively.** The Manufacturing industry experienced the biggest contraction, shedding nearly 1,100 jobs (11%) during this time. Retail Trade lost approximately 851 jobs (12%) and Government contracted by 525 (5%).
- ◆ An increase in e-commerce sales has strengthened Western New York's industrial real estate market. Increased demand for warehouse space to support e-commerce has resulted in a record low industrial real estate vacancy rate of 3.4%.
- ◆ **Stage 2 companies, those with 10-99 employees, were the only segment of businesses that did not shed jobs between 2013 to 2018. These companies added 100 jobs.** Self-employed, Stage 1 (2-9 employees), Stage 3 (100-499), and Stage 4 establishments (500+) all lost jobs. Stage 4 establishments contracted by 22% (a loss of 4,200 jobs). **This data demonstrates an opportunity to assist Stage 1 (2-9 employees) and Stage 2 (10-99 employees) businesses stabilize and scale up within the county to mitigate job losses. It also suggests the need to assist larger businesses who may be downsizing due to technological advances or contemplating moving out of the region.**

Chautauqua County, New York

- ◆ **Distinct economic patterns exist in Erie and Niagara Counties compared to Chautauqua, Cattaraugus, and Allegany Counties.** Jobs grew by a total of 4% (22,127 jobs) in Erie and Niagara Counties over the last decade, while jobs in the three other counties decreased by 7% (7,804 jobs). The unemployment rate is nominally different among the sub-regions, while average earnings per job are about \$10,762 higher in Erie and Niagara counties compared to the three other rural counties

Workforce Readiness

- ◆ **Education and hiring trends in the county reveal trade skills and soft skills that do not require 4-year college degrees are most in demand by employers in Chautauqua County.** This is reflected in educational attainment figures. A greater percentage of Chautauqua County residents hold Associate's Degrees than Western NY, New York State, and the nation. Additionally, approximately 12% of county residents have bachelor's degrees. This is compared to nearly 17% in Western NY and over 20% in the state and the nation.
- ◆ In 2019, the top three occupations in Chautauqua County were: 1) Food and Beverage Serving Workers, 2) Retail Sales Workers, and 3) Other Personal Care and Service Workers.
- ◆ **On average, there are more people trained in Production Occupations in Chautauqua County compared to the rest of the across the country. This reflects the strong manufacturing industry in the county.** Production Occupations, classified under SOC 51, include a wide range of positions that fuel the manufacturing industry across the country.
- ◆ **While there is a high concentration of Production Occupations in Chautauqua County, there remains an extremely high demand for more positions. The number of job postings for Production Occupations in Chautauqua County is more than double the national average.** This demonstrates employers' dire needs to fill positions to maintain and potentially grow operations.
- ◆ Based on EMSI's 2019 Talent Attraction Scorecard, Chautauqua County does not rank competitively among large counties in the U.S. (100,000 +) in terms of workforce talent attraction. This ranking is on par with other large Western New York Counties; however, smaller counties such as Cattaraugus and Alleghany saw improvements in their ranking among other U.S. small counties.

Community Development

- ◆ As of 2019, approximately 131,000 people reside in Chautauqua County. From 2010-2019, the county's population decreased 3.0%. This is compared to growth rates of 0.4% in the Western NY Region, 3.4% in New York State, and 7.7% in the U.S. over the same period.
- ◆ Chautauqua County's proportion of middle-aged people (specifically age 30-49) is smaller than the comparison geographies, but its overall population distribution is similar to that of Western NY. The county also has a smaller proportion of children under the age 15 than compared with the state and the nation.
- ◆ **As of 2019, the median household income in Chautauqua County was \$46,401, which is approximately \$7,400 lower than Western New York and \$19,488 lower than the state's median household income. By 2024, the county's median household income is expected to reach \$51,202, representing a 10% increase.** This rate of increase is similar to the Western NY Region (9%), but slower than New York State (15%) and the U.S. (14%).
- ◆ **The percentage of remote workers in Chautauqua County is larger than in Niagara, Erie, Cattaraugus, and Allegany Counties.** At 3.7%, the proportion of remote workers in the county is still smaller than the national average of 5%; however, **based on trends in talent attraction and flexible workstyles, there**

Chautauqua County, New York

may be an opportunity for the county to leverage its quality of life assets to grow this segment of the labor force.

Housing Development

- ◆ Commuting patterns for Chautauqua County indicate that a significant portion of the county's workforce lives within the county (73%). While the remaining 27% of the workforce lives outside of the county. The Cities of Jamestown and Dunkirk, and the Town of Ellicott, are the top locations where County residents work.
- ◆ **According to the 2013-2017 American Community Survey, Chautauqua County had a net migration of 1,304 residents during that 5-year time frame.⁴ With a positive net migration, but overall population loss, the county demonstrated a negative natural increase.** In other words, there are more deaths in the county than can be made up for with in-migration. The top outbound counties, or places that Chautauqua County residents moved to, are located out of the state. These include Wake County, NC; Erie County, PA; Polk County, FL; Warren County, PA; Stark County, OH; and Cuyahoga County, OH.
- ◆ Chautauqua County's housing stock is aging and is heavily weighted towards single family homes (70%). The median year that homes in the County were built is 1950, and very little new stock has been added to the stock in recent years.
- ◆ The 2019 vacancy rate (22%) in Chautauqua County is driven up by seasonal homes, which are classified under vacant units. When seasonal homes are removed from consideration in the vacancy rate calculation, the rate drops to 9%. The vacancy rate in Western New York is also 9% when seasonal homes are removed from the total vacant units. **Seasonal homeowners can be a valuable contribution to a tourism economy. Yet, it can be a challenge to identify the owners of homes and determine their motivation for having a second home in the county.**

Tourism & Quality of Life

⁴ Includes both domestic and international migration. Note that this does not take into account birth or death rates, and that the period of observation differs from that used for the population change data.

Chautauqua County, New York

- ◆ The greatest number of jobs in the tourism industry are within Hotels and Motels, followed by much smaller employment figures in Skiing Facilities and Marinas.
- ◆ **Both Skiing Facilities and Marinas show high Location Quotients (4.4 and 4.2) with positive Competitive Effects**, meaning the industries gained more jobs than would be expected based on typical industry and national trends.
- ◆ An overall negative Competitive Effect in the Chautauqua County's tourism industry (-214) indicates that the region lost more jobs than anticipated based on industry and national trends. Meanwhile, Western New York picked up almost 1,000 more jobs than anticipated based on economic conditions.
- ◆ Within the three more rural counties of Western New York, Chautauqua County generates the most visitor spending, about \$261,522,000, along with half of local taxes associated with visitation.

Location Quotient

Location quotient is a measure of industry concentration, indicating how concentrated a certain sector is in a given area of study, relative to the nation. It can reveal what makes a particular region "unique" in comparison with the national average. A location quotient greater than 1 indicates that sector employment in the study area is more concentrated than it is at the national level.

INTRODUCTION

As part of the initial research for the Chautauqua Region Economic Development Corporation's (CREDC) Strategy, Camoin 310 gathered and analyzed demographic and economic data to assess the existing conditions in Chautauqua County. This information will be used to inform the subsequent steps of the planning process.

DATA SOURCES

Much of the data in this report was acquired from Esri Business Analyst Online (ESRI) and Economic Modeling Specialists International (EMSI). ESRI uses the 2000 and 2010 Census as its base data. The report uses proprietary statistical models and data from the US Census Bureau, the US Postal Service, and other sources to project current statistics and future trends. ESRI data are often used for economic development, marketing, site selection, and strategic decision making. For more information, visit www.esri.com.

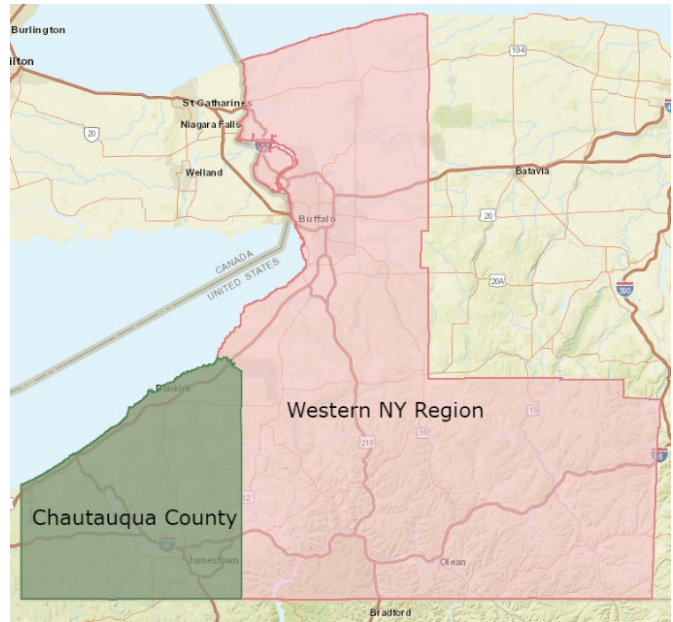
EMSI uses data compiled from several sources, including the US Census Bureau and US Departments of Health and Labor. Using specialized proprietary processes and models, it provides estimates on current statistics and predicts future trends. Visit www.economicmodeling.com for additional information. The data used are from EMSI's Complete Employment data set, which includes both jobs covered and uncovered by unemployment insurance. In other words, it includes both traditional employment and non-traditional employment, such as the self-employed. As traditional jobs have been replaced or augmented by freelance work, consulting, and self-employment, these non-covered jobs have become much more important to the economy, and EMSI provides researchers with a way to track the trends over time.

Other sources include the American Community Survey for demographic and socioeconomic data, YourEconomy.org for data on jobs by establishment stage of growth, and PitchBook for venture capital investment data.

Chautauqua County, New York

STUDY REGIONS

This data analysis was conducted to identify demographic, socioeconomic, and business and industry trends in the Chautauqua County economy in comparison to the regional and state economies. Data was collected for the following geographies: Chautauqua County, Western NY Region (defined as the five county region that includes Niagara, Erie, Chautauqua, Cattaraugus, and Allegany counties), and New York State. Where appropriate, we also compare against the United States and the Buffalo-Cheektowaga-Niagara Falls metro area.



SOCIOECONOMIC ANALYSIS

POPULATION

As of 2019, nearly 131,000 people live with in Chautauqua County. Since 2010, Chautauqua County’s population has decreased by 3%. This is compared to relatively flat population change in Western New York, and positive population growth in New York and the United States (Refer to Table 1).

Table 1: Population, 2010-2024

Population, 2010-2024					
	2010	2019	2024	% Change 2010-2019	% Change 2019-2024
Chautauqua County	134,905	130,823	126,641	-3.0%	-3.2%
Western NY	1,399,677	1,404,712	1,397,419	0.4%	-0.5%
New York	19,378,102	20,030,453	20,245,169	3.4%	1.1%
United States	308,745,538	332,417,793	345,487,602	7.7%	3.9%

Source: ESRI

When examining age distribution, Chautauqua County basically mirrors that of Western New York. Chautauqua County does have a noticeably smaller middle-aged population (specifically, age 30-49) than the other geographies (Refer to Figure 1).

Chautauqua County, New York

Figure 1: Total Population by Age Cohort, 2019

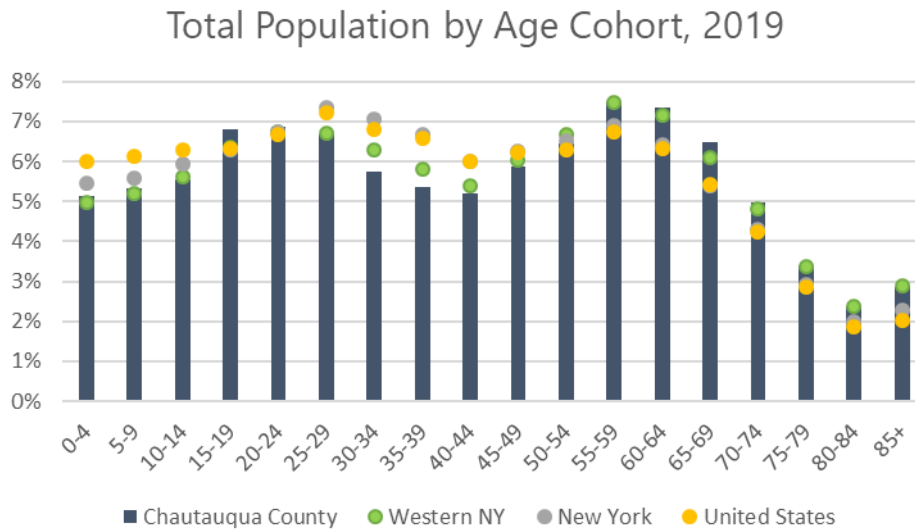


Table 2 and Figure 2 show how Chautauqua County’s population has changed from 2000 to 2019 and how it is expected to change from 2019 to 2024 as depicted in 5-year age cohorts. Chautauqua County can expect to experience a decline in the number of children and young adults aged 0 to 29 as well as a decline in middle-aged adults (45 to 64). Most notably, there is a significant anticipated gain of 70 to 79-year olds, skewing the population to an older demographic. It also divulges a decrease in young population (age 0-10), a decrease in the middle-aged population (30-54), and an increase in young adults (15-34years old)

Chautauqua County, New York

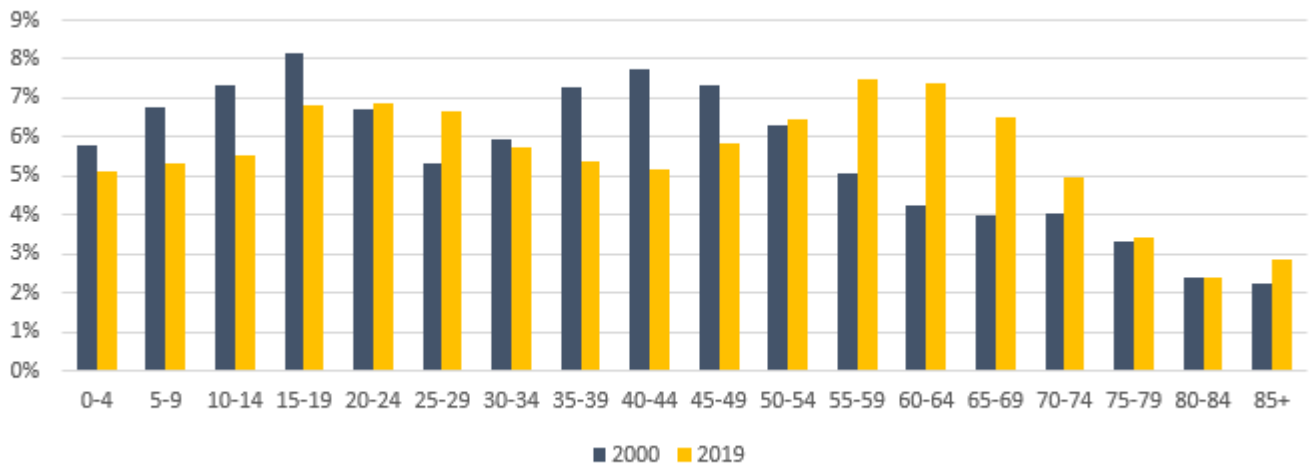
Table 2: Chautauqua County Population by Age Cohort, 2000-2024

Chautauqua County Population by Age Cohort, 2000-2024								
	2000	2010	2019	2024	Change 2000-2019	% Change 2000-2019	Change 2019-2024	% Change 2019-2024
0-4	8,082	7,568	6,715	6,429	(1,367)	-17%	(286)	-4%
5-9	9,472	7,930	6,983	6,653	(2,489)	-26%	(330)	-5%
10-14	10,268	8,483	7,256	7,033	(3,012)	-29%	(223)	-3%
15-19	11,360	10,620	8,911	8,722	(2,449)	-22%	(189)	-2%
20-24	9,387	10,113	8,982	7,988	(405)	-4%	(994)	-11%
25-29	7,409	7,299	8,738	7,062	1,329	18%	(1,676)	-19%
30-34	8,319	6,686	7,517	7,883	(802)	-10%	366	5%
35-39	10,158	7,303	7,030	7,246	(3,128)	-31%	216	3%
40-44	10,832	8,191	6,786	7,010	(4,046)	-37%	224	3%
45-49	10,223	9,912	7,668	6,791	(2,555)	-25%	(877)	-11%
50-54	8,823	10,447	8,448	7,503	(375)	-4%	(945)	-11%
55-59	7,109	9,825	9,815	8,209	2,706	38%	(1,606)	-16%
60-64	5,936	8,147	9,626	9,202	3,690	62%	(424)	-4%
65-69	5,574	6,307	8,498	8,921	2,924	52%	423	5%
70-74	5,614	4,818	6,520	7,415	906	16%	895	14%
75-79	4,670	4,180	4,467	5,440	(203)	-4%	973	22%
80-84	3,375	3,532	3,117	3,526	(258)	-8%	409	13%
85+	3,139	3,544	3,746	3,608	607	19%	(138)	-4%
18+	105,519	105,459	105,485	102,242	(34)	0%	(3,243)	-3%

Source: Esri, US Census

Figure 2: Chautauqua County Total Population by Age Cohort, 2000-2019

Chautauqua County Total Population by Age Cohort, 2000-2019

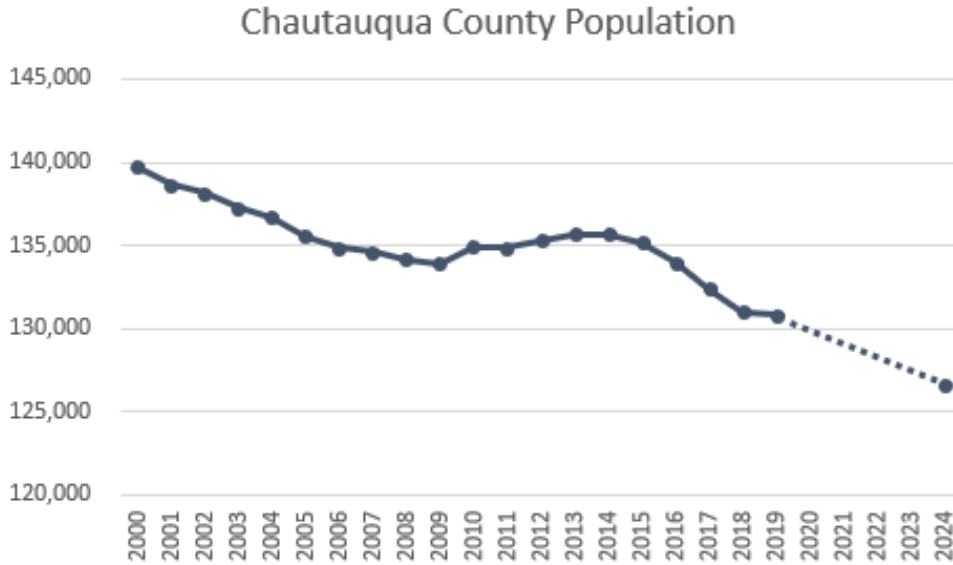


Source: ESRI, US Census

Chautauqua County, New York

Despite a slight uptick in population between 2010 and 2014, the County’s population has continued to decline. Pending significant intervention or transformative projects, this population decrease is expected to continue through 2024 (Refer to Figure 3).

Figure 3: Chautauqua County Population



Source: ESRI, US Census

As of 2019, Chautauqua County has a median age of 42.4, making it slightly older than the Western New York region and older than the state and nation. Median age is projected to increase across all geographies into 2024 at a similar rate (Refer to Table 3).

Table 3: Median Age, 2019-2024

Median Age, 2019-2024				
	2019	2024	Change 2019-2024	% Change 2019-2024
Chautauqua County	42.4	43.1	0.7	2%
Western NY	42.1	42.8	0.7	2%
New York	39.2	40.2	1	3%
United States	38.5	39.2	0.7	2%

Source: ESRI

Chautauqua County, New York

HOUSEHOLDS & INCOME

The total number of households decreased from 2010 to 2019, with the number of households remaining relatively flat in Western New York and increasing in the state and the nation. These trends are projected to continue through 2024 (Refer to Table 4).

Table 4: Households, 2010-2024

Households, 2010-2024					
	2010	2019	2024	% Change 2010-2019	% Change 2019-2024
Chautauqua County	54,244	52,406	50,573	-3%	-3%
Western NY	578,435	583,445	581,242	1%	0%
New York	7,317,755	7,541,262	7,611,733	3%	1%
United States	116,716,292	125,168,557	129,922,162	7%	4%

Source: ESRI

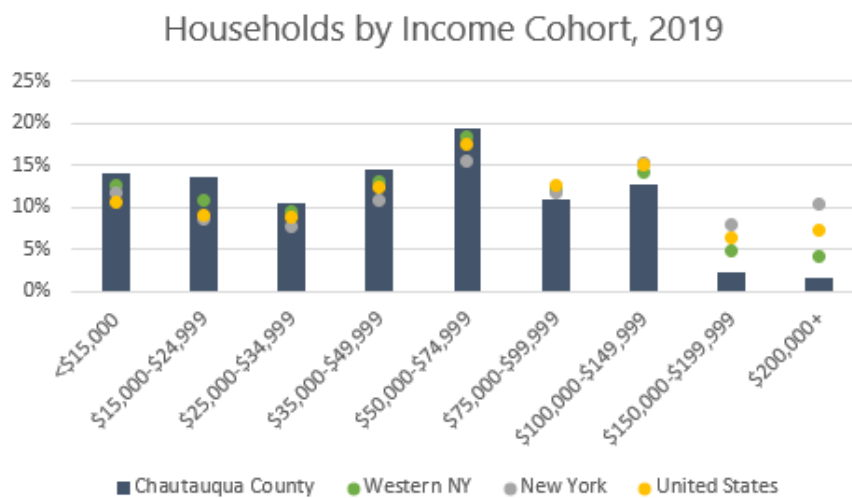
As of 2019, the median household income in Chautauqua County was \$46,401, which is lower than the region, state, and nation (Refer to Table 5). Median household income in the county is expected to increase at a similar rate as the region, increasing by 10% by 2024 (Refer to Figure 4).

Table 5: Median Household Income, 2019-2024

Median Household Income, 2019-2024				
	2019	2024	Change 2019-2024	%Change 2019-2024
Chautauqua County	\$ 46,401	\$ 51,202	\$ 4,801	10%
Western NY	\$ 53,800	\$ 58,548	\$ 4,748	9%
New York	\$ 65,889	\$ 75,649	\$ 9,760	15%
United States	\$ 60,548	\$ 69,180	\$ 8,632	14%

Source: ESRI

Figure 4: Households by Income Cohort, 2019



Source: ESRI

Chautauqua County, New York

EDUCATIONAL ATTAINMENT

A higher percentage of the County’s residents hold an associate’s degree (13.5%). Additionally, a smaller proportion of County residents have obtained bachelor’s degrees than the comparison geographies. Approximately 12% of Chautauqua County residents have obtained bachelor’s degrees. This is compared to nearly 17% in Western New York and over 20% in the state and nation (Refer to Figure 5).

Figure 5: Educational Attainment of Population Ages 25+, 2019

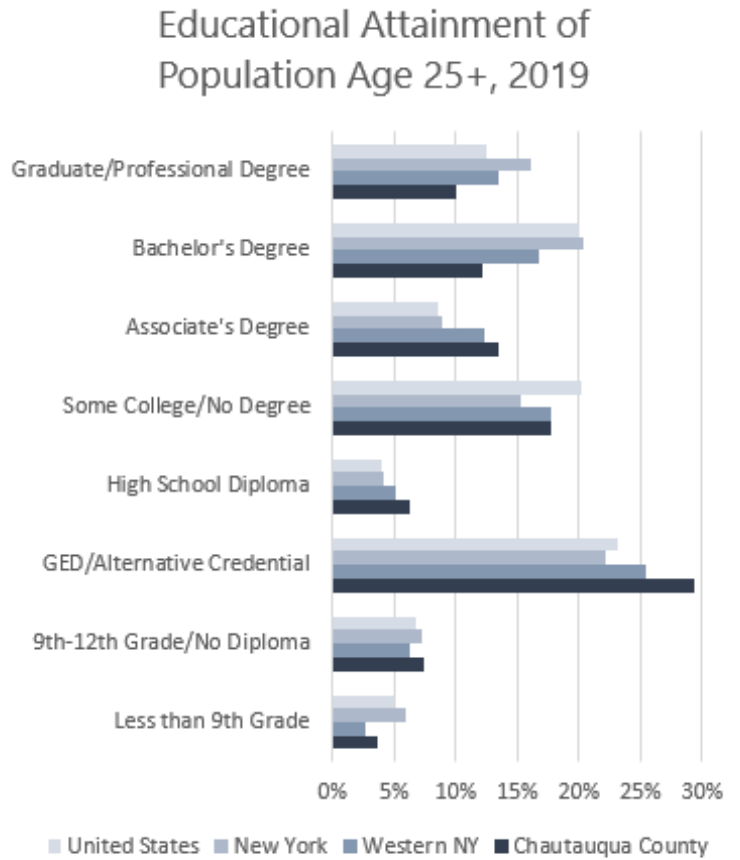


Table 6: In-Demand Skills in Chautauqua County Job Postings

In-Demand Skills in Chautauqua County Job Postings	
Skill	Frequency in Job Postings
Hard Skills	
Merchandising	6%
Nursing	4%
Selling Techniques	4%
Restaurant Operation	4%
Cash Register	3%
Common Skills	
Customer Service	16%
Sales	15%
Management	13%
Communications	12%
Operations	9%

Source: EMSI

The educational attainment of the county’s residents aligns with the anticipated job options in the county, that being associates degrees, high school diplomas and GED/alternative credentials. The most in-demand skills in the county show that these skills are not necessarily acquired at a four-year university (Refer to Table 6).

Source: ESRI

Chautauqua County, New York

Similarly, except for nursing, the top occupations that are in demand in the County do not require a four-year college degree. Basically, this implies means that the educational attainment of the population aligns with the job market in Chautauqua County. The top posted jobs are:

- ◆ Heavy and Tractor-Trailer Truck Drivers;
- ◆ Registered Nurses;
- ◆ First-Line Supervisors of Retail Sales Workers;
- ◆ Retail Salespersons; and
- ◆ Light Truck or Delivery Services Drivers.

SUNY Fredonia is one of the institutions that serves an important function in Chautauqua County's education ecosystem and in preparing the County's future workforce. Although 2019 enrollment is down, applications to the university are up.⁵ With SUNY Fredonia focusing on recruitment efforts from the Cleveland, Erie, and Pittsburgh metropolitan areas, this represents an opportunity for the County to attract and retain younger residents. According to a survey conducted by SUNY Fredonia, over 40% of graduates plan to seek work in New York State following graduation. Additionally, another 31% of respondents are not sure if they plan to secure a job in New York State following graduation. **By positioning the County as one with job opportunities and an attractive quality of life, Chautauqua County has the opportunity to capture some of this 31% who are currently uncertain about where they, intend to locate to after graduation.**

UNEMPLOYMENT RATES

Chautauqua County's 2019 unemployment rate of 3.6% is slightly higher than Western New York, but lower than New York and the United States. This is indicative of a tight labor market in the county and region (Refer to Table 7).

Table 7: Unemployment Rate, 2019*

Unemployment Rate, 2019	
Chautauqua County	3.6%
Western NY	3.3%
New York	4.4%
United States	4.6%

Source: ESRI

*This represents figures pre-COVID-19

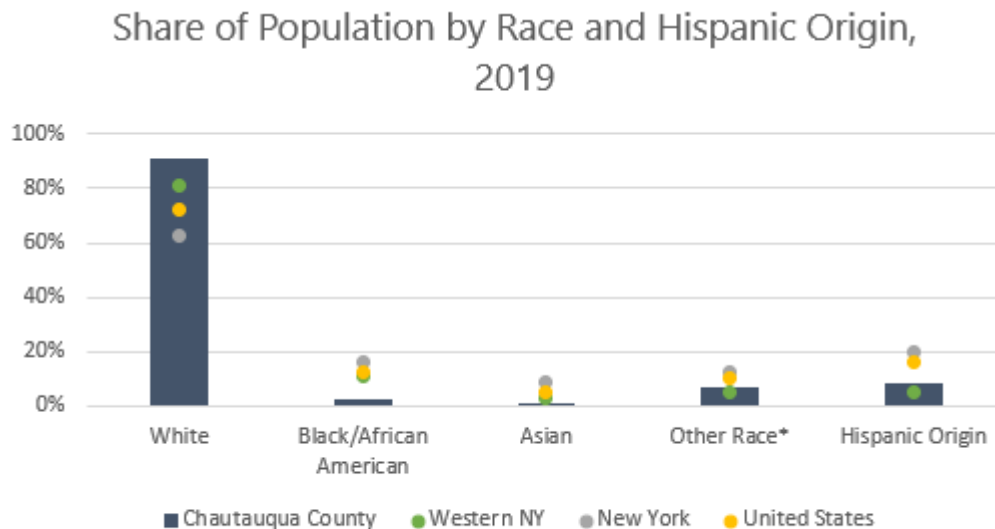
⁵ Stafford, M.J. "SUNY Fredonia Enrollment Down 4.2%." Observer, 26 Oct. 2019.

Chautauqua County, New York

RACE/ETHNICITY

Non-white residents make up about 9% of Chautauqua County's population, compared to 19% in Western New York and 38% in New York State. Black/African Americans make up 3% of the county's population while Asians make up 1% (Refer to Figure 6).

Figure 6: Share of Population by Race and Hispanic Origin, 2019



Source: ESRI

MARKET SEGMENTATION ANALYSIS

As Chautauqua County seek to create an economic strategy, understanding the characteristics of its consumers is vital to success. A market segmentation analysis provides insight into the likely preferences and behaviors of a community's residents, based on their demographic and economic characteristics. For Chautauqua County, this analysis is used to understand what types of activities, shopping, dining, and other experiences its residents are likely to enjoy. Market segmentation is based on the concept that people with similar demographic characteristics, purchasing habits, and media preferences naturally gravitate into the same neighborhoods – like a tapestry. Businesses utilize market or “tapestry” segmentation to understand their customers' lifestyle choices, purchasing preferences, and how they spend their free time.

ESRI's Tapestry Segmentation System classifies U.S. neighborhoods based on socioeconomic and demographic composition. Descriptions of all of the tapestry segments listed below are included in the attachments. The following table communicates the breakdown of the top tapestry segments that make up Chautauqua County, with a description of each provided in Table 8 below.

Chautauqua County, New York

Table 8: County of Chautauqua Tapestry Segments

County of Chautauqua Tapestry Segments					
Tapestry Segment	Households	Percent	Median Age	Median Income	Median Net Worth
Heartland Communities	8,018	15.3%	42.3	\$ 42,400	\$ 70,900
Salt of the Earth	7,808	14.9%	44.1	\$ 56,300	\$ 167,700
Traditional Living	5,712	10.9%	35.5	\$ 39,300	\$ 33,900
Hardscrabble Road	5,083	9.7%	32.4	\$ 28,200	\$ 12,500
Midlife Constants	4,612	8.8%	47	\$ 53,200	\$ 138,300
Rooted Rural	4,245	8.1%	45.2	\$ 42,300	\$ 92,500

Source: ESRI

- ◆ **“Heartland Communities”** Residents embrace the lifestyle of rural communities and small towns. They are budget savvy consumers who stick to the brands they know and trust TV and newspapers over other media sources. Many residents of these communities are retired or semi-retired and heading towards retirement.
- ◆ **“Salt of the Earth”** Residents are entrenched in their traditional, rural lifestyles. They tend to be older, with most possessing a high school diploma only. These are cost-conscious consumers who are loyal to brands they like and make spending time with family their top priority.
- ◆ **“Traditional Living”** Residents are a mix of married-couple families and singles. This is a younger market of people who are beginning householders who balance the responsibilities of adult life with their youthful interests in style and fun. Residents are cost-conscious consumers with brand loyalty, unless the price is too high.
- ◆ **“Hardscrabble Road”** Residents live in urbanized areas with an older housing stock. The families that make up this category are cost conscious consumers who purchase sale items in bulk and tend to buy generic brands over name brands. Many of these householders are renters, and 1 in 3 households have income below the poverty level.
- ◆ **“Midlife Constants”** Residents are seniors who are at or approaching retirement. These residents are very traditional, opting for convenience over comfort. They use technology selectively and are attentive to price, but not at the expense of quality. Residents typically live in older, single family homes.
- ◆ **“Rooted Rural”** Residents enjoy spending time outdoors and are heavily influenced by religious faith, traditional gender roles, and family history. These residents have a do-it-yourself mentality, growing their own food where possible and working on their own cars. There is a heavy focus on necessity rather than trend setting.

Through these top six tapestry segments, certain themes start to emerge. Consistent across these segments are the themes of sticking to traditional ways of doing things, a cost-conscious attitude towards purchases, and making decisions based on necessity rather than current trends. Additionally, many residents in these segments are at or nearing retirement, with some younger families and singles also in the mix.

Chautauqua County, New York

COMMUTING PATTERNS & REMOTE WORKERS

Commuting patterns for Chautauqua County indicate that there are approximately 35,000 people employed within the county. Census Data shows that 27% of workers live outside of the county and 73% live within the county.

Table 9: Top 10 Places of Residence for Chautauqua County Workers

Top 10 Places of Residence for Chautauqua County Workers		
	Number of Workers	Percent of Workers
Jamestown City (Chautauqua, NY)	6,417	18.3%
Dunkirk City (Chautauqua, NY)	2,417	6.9%
Ellicott Town (Chautauqua, NY)	2,229	6.4%
Pomfret Town (Chautauqua, NY)	2,001	5.7%
Busti Town (Chautauqua, NY)	1,883	5.4%
Hanover Town (Chautauqua, NY)	920	2.6%
Ellery Town (Chautauqua, NY)	847	2.4%
Carroll Town (Chautauqua, NY)	834	2.4%
Westfield Town (Chautauqua, NY)	818	2.3%
Chautauqua Town (Chautauqua, NY)	757	2.2%
All Other Locations	15,896	45.4%
Total	35,019	100%

Source: US Census OnTheMap, 2017

The adjacent Table 9 displays the top 10 places where workers live in Chautauqua County. The City of Jamestown constitutes the greatest percentage of workers at about 18.3%. All of the top 10 places of residence are locations within Chautauqua County; approximately 45.4% of workers live in locations not included in the top 10.

Table 10: Top 10 Places of Work for Chautauqua County Residents

Top 10 Places of Work for Chautauqua County Residents		
	Number of Residents	Percent of Residents
Jamestown City (Chautauqua, NY)	7,831	20.8%
Ellicott Town (Chautauqua, NY)	3,676	9.8%
Dunkirk City (Chautauqua, NY)	2,996	8.0%
Busti Town (Chautauqua, NY)	2,671	7.1%
Pomfret Town (Chautauqua, NY)	1,776	4.7%
Dunkirk Town (Chautauqua, NY)	1,174	3.1%
Buffalo City (Erie, NY)	1,089	2.9%
Westfield Town (Chautauqua, NY)	905	2.4%
Amherst Town (Erie, NY)	778	2.1%
Chautauqua Town (Chautauqua, NY)	747	2.0%
All Other Locations	13,992	37.2%
Total	37,635	100%

Source: US Census OnTheMap, 2017

Approximately 20.8% of county residents work within the City of Jamestown, while 9.8% work in the Town of Ellicott (Refer to Table 10). The City of Buffalo and the Town of Amherst, which are located in Erie County, are among the top 10 places county residents located outside of Chautauqua County (approximately 5%).

Chautauqua County, New York

Of the 5-counties in the Western New York region, Chautauqua County has the shortest mean commute time of 18.0 minutes, which is a competitive advantage with respect to attracting and retaining workers (Refer to Table 11).

Table 11: Mean Commute Time

Mean Commute Time	
County	Minutes
Chautauqua County, NY	18.0
Niagara County, NY	22.0
Erie County, NY	21.3
Cattaraugus County, NY	21.9
Allegany County, NY	21.4

Source: EMSI

MIGRATION FLOWS

According to the 2013-2017 American Community Survey, Chautauqua County had a net migration of 1,304 residents during that 5-year timeframe.⁶ With a positive net migration, but overall population loss, the county demonstrates a negative natural increase. In other words, there are more deaths in the county than can be made up for with in-migration.

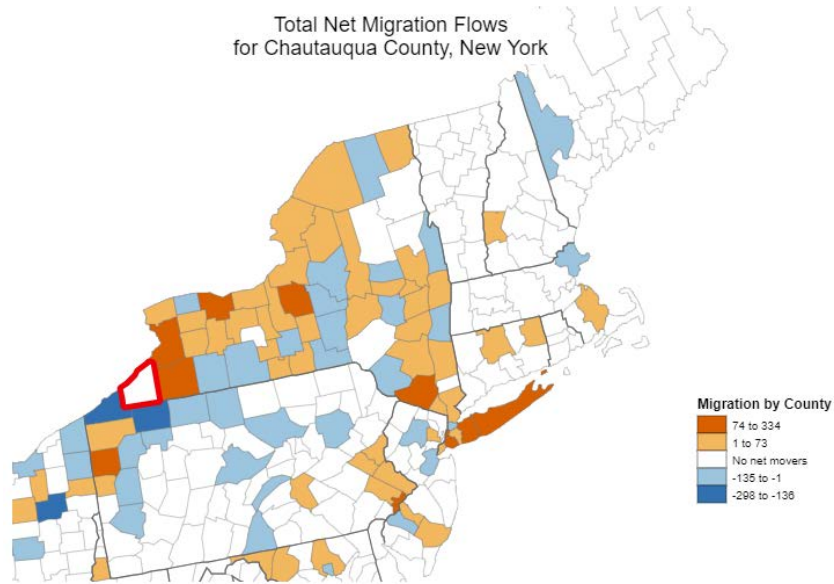
Counties contributing the most inbound migration to Chautauqua County include Erie, Cattaraugus, Monroe, Kings, Suffolk, Onondaga, and Nassau – all within New York State. The top outbound counties, or places that Chautauqua County residents moved to, are located out of the state. These include Wake County, NC; Erie County, PA; Polk County, FL; Warren County, PA; Stark County, OH; and Cuyahoga County, OH.

Figure 7 displays the net migration for Chautauqua County. Counties represented in dark and light orange indicate counties with populations that moved into Chautauqua County, and counties in light and dark blue notate areas where Chautauqua County residents migrated to. The Long Island, NY counties (Nassau and Suffolk) that are contributing to Chautauqua County's inbound migration are experiencing a large exodus of young adults between the ages of 18 and 34. According to a survey by Long Island index, the top reasons given for leaving these counties are expensive housing, low average income, and no prospect for improvement in standard of living.

⁶ Includes both domestic and international migration. Note that this does not take into account birth or death rates, and that the period of observation differs from that used for the population change data.

Chautauqua County, New York

Figure 7: Total Net Migration Flows, Chautauqua County



TAX COMPARISON

Tax rates on property, income, and businesses are often considerations for people choosing to move into or out of an area. These rates can have a large impact on the financial situation of individuals, families, and businesses and as a result are an important factor in determining where people choose to locate.

For individuals migrating out of Chautauqua County, the neighboring counties in Pennsylvania (specifically Erie County, PA and Warren County, PA) are some of the top destinations. A property tax rate comparison between Chautauqua County, the other four counties in the Western New York Region, and these two neighboring counties in Pennsylvania reveal that property taxes expressed in terms of millage rates⁷ are significantly lower in Pennsylvania. Millage rates or “mill rates” are used to calculate local property taxes and represent the amount per every \$1,000 or a property’s taxable assessed value (Refer to Table 12). Of the Western New York counties, Chautauqua’s mill rate of 8.36 falls in the middle. Although Chautauqua County has cut property taxes in recent years, the multitude of taxing jurisdictions in

Property Tax Rate Comparison, 2018

	Millage Rate
Western NY	
Allegany County, NY	14.59
Cattaragus County, NY	12.46
Chautauqua County, NY	8.36
Niagara County, NY	8.16
Erie County, NY	5.55
Neighboring PA Counties	
Erie County, PA	0.00541
Warren County, PA	0.0215

Source: NYS Comptroller, Erie County PA, Warren County PA

*Warren County, PA millage rate is for 2019.

⁷ Millage rates, or “mill rates” are used to calculate local property taxes and represent the amount per every \$1,000 or a property’s taxable assessed value.

Chautauqua County, New York

New York state still results in high total taxes for residents. Combined county, city, and school taxes are still relatively high, particularly in Jamestown and Dunkirk.⁸

Similarly, income tax rates are lower in Pennsylvania than New York (approximately 3.07% vs. 4.00%-8.82%).⁹ This means that individuals who hold jobs in the Western New York Region could choose to live over the border in Pennsylvania, commute to work, and pay lower property and income taxes.

Pennsylvania is less competitive than New York in terms of corporate income taxes. The Tax Foundation's Business Tax Climate index¹⁰ ranks Pennsylvania 46th versus the other states in terms of corporate taxes. This is compared to New York's ranking of 13th. Overall; however, when taking into account corporate, income, sales, property, and unemployment insurance taxes, New York ranks nearly last on this index at 49th while Pennsylvania ranks 29th.

⁸ Whittaker, John. "Chautauqua County Continues to See Drop in Population." The Post-Journal, 22 April 2018.

⁹ Tax-Rates.org

¹⁰ The Tax Foundation's State Business Tax Climate Index is a way to compare tax systems between states. This index is designed to show how well states structure their tax systems. A rank of 1 on the index is best and 50 is worst. This data reflects tax systems as of July 1, 2019. For more information: <https://taxfoundation.org/publications/state-business-tax-climate-index/>

INDUSTRY ANALYSIS

EMPLOYMENT BY SECTOR (2-DIGIT NAICS)

Chautauqua County is home to approximately 53,000 jobs, having lost about 4,500 jobs, a loss of 8%, over the last ten years from 2009 to 2019. The number of jobs is expected to remain relatively flat in the next ten years to 2029. Government is the largest sector in Chautauqua County, with nearly 10,000 jobs.

CURRENT EMPLOYMENT BY SECTOR

Figure 8 and Table 13 shows the distribution of employment by 2-digit employment sectors within the county. The top five sectors for 2019 include:

- ◆ Government (9,834 jobs or 19% of all jobs)
- ◆ Manufacturing (8,913 jobs or 17% of all jobs)
- ◆ Health Care and Social Assistance (8,015 jobs or 15% of all jobs)
- ◆ Retail Trade (6,328 jobs or 12% of all jobs)
- ◆ Accommodation and Food Services (4,901 jobs or 9% of all jobs)

HISTORIC GROWTH

Between 2009 and 2019, the Agriculture, Forestry, Fishing and Hunting and the Arts, Entertainment and Recreation industries are the only industries that have experienced positive growth, adding 52 and 81 jobs respectively (Refer to Table 14). The Manufacturing industry experienced the biggest contraction in the past ten years, shedding nearly 1,100 jobs or 11%. Retail Trade lost approximately 851 jobs (12%) and Government contracted by 524 (5%).

PROJECTED GROWTH

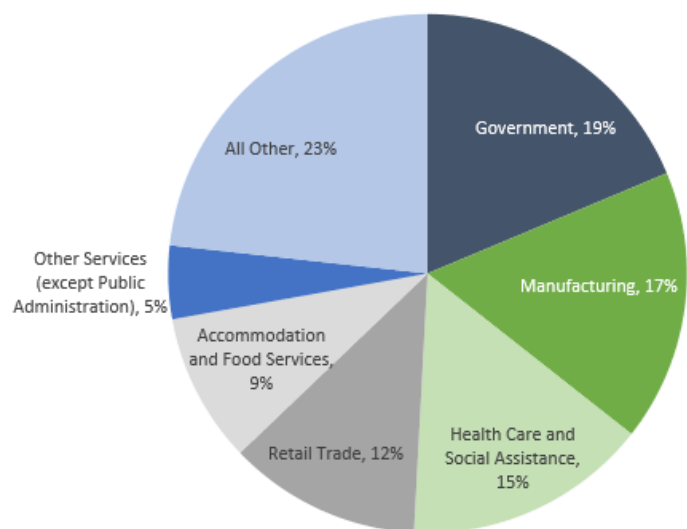
Health Care and Social Assistance is the industry with the most anticipated growth, adding 836 jobs (growth rate of 10%) to Chautauqua County. Government is anticipated to grow by 331 jobs (3%) while Administrative and Support and Waste Management and Remediation Services is anticipated to grow by 148 jobs (8%).

EARNINGS

Average earnings per job (including wages and supplements) in Chautauqua was about \$51,000 in 2019. Sectors with the highest average earnings included Utilities (\$117,384), Government (\$76,159), and Manufacturing (\$71,151). Accommodation and Food Services and Arts, Entertainment, and Recreation were at the low end of the earnings spectrum, with average annual earnings of about \$19,600 and \$23,000.

Figure 8: Chautauqua County Employment by Sector, 2019

Chautauqua County Employment by Sector, 2019



Source: EMSI

Chautauqua County, New York

Table 13: Employment by Sector, 2-Digit NAICS, Chautauqua County

Employment by Sector, 2-Digit NAICS - Chautauqua County									
NAICS	Description	2009 Jobs	2019 Jobs	2029 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 - 2029 Change	% Change 2019 - 2029	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing & Hunting	861	913	943	52	6%	30	3%	\$38,563
21	Mining, Quarrying, and Oil & Gas Extraction	255	92	102	(163)	(64%)	10	11%	\$51,891
22	Utilities	315	199	195	(116)	(37%)	(4)	(2%)	\$117,384
23	Construction	2,284	2,232	2,362	(52)	(2%)	130	6%	\$52,018
31	Manufacturing	10,005	8,913	8,239	(1,092)	(11%)	(674)	(8%)	\$71,151
42	Wholesale Trade	1,212	1,112	1,107	(100)	(8%)	(5)	(0%)	\$58,379
44	Retail Trade	7,179	6,328	5,806	(851)	(12%)	(522)	(8%)	\$31,958
48	Transportation & Warehousing	1,239	1,113	1,178	(126)	(10%)	65	6%	\$53,115
51	Information	729	491	306	(238)	(33%)	(185)	(38%)	\$45,433
52	Finance & Insurance	965	874	817	(91)	(9%)	(57)	(7%)	\$59,812
53	Real Estate & Rental & Leasing	605	462	409	(143)	(24%)	(53)	(11%)	\$41,733
54	Professional, Scientific, & Technical Services	1,195	1,073	1,111	(122)	(10%)	38	4%	\$59,794
55	Management of Companies & Enterprises	238	170	33	(68)	(29%)	(137)	(81%)	\$35,105
56	Administrative & Support; Waste Management & Remediation Services	1,975	1,861	2,009	(114)	(6%)	148	8%	\$30,961
61	Educational Services	773	745	841	(28)	(4%)	96	13%	\$37,995
62	Health Care & Social Assistance	8,090	8,015	8,851	(75)	(1%)	836	10%	\$45,704
71	Arts, Entertainment, & Recreation	800	881	942	81	10%	61	7%	\$23,076
72	Accommodation & Food Services	5,136	4,901	4,963	(235)	(5%)	62	1%	\$19,587
81	Other Services (except Public Admin.)	2,867	2,404	2,370	(463)	(16%)	(34)	(1%)	\$26,527
90	Government	10,358	9,834	10,165	(524)	(5%)	331	3%	\$76,159
99	Unclassified Industry	30	27	<10	(3)	(10%)	Insf. Data	Insf. Data	\$24,596
Total		57,112	52,640	52,759	(4,472)	(8%)	119	0%	\$51,023

Source: EMSI

Chautauqua County, New York

Table 14: Employment by Historical Percent Change

Employment by Sector, 2-Digit NAICS - Chautauqua County									
NAICS	Description	2009 Jobs	2019 Jobs	2029 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 - 2029 Change	% Change 2019 - 2029	Avg. Earnings Per Job
71	Arts, Entertainment, & Recreation	800	881	942	81	10%	61	7%	\$23,076
11	Agriculture, Forestry, Fishing & Hunting	861	913	943	52	6%	30	3%	\$38,563
62	Health Care & Social Assistance	8,090	8,015	8,851	(75)	(1%)	836	10%	\$45,704
23	Construction	2,284	2,232	2,362	(52)	(2%)	130	6%	\$52,018
61	Educational Services	773	745	841	(28)	(4%)	96	13%	\$37,995
72	Accommodation & Food Services	5,136	4,901	4,963	(235)	(5%)	62	1%	\$19,587
90	Government	10,358	9,834	10,165	(524)	(5%)	331	3%	\$76,159
56	Administrative & Support; Waste Management & Remediation Services	1,975	1,861	2,009	(114)	(6%)	148	8%	\$30,961
42	Wholesale Trade	1,212	1,112	1,107	(100)	(8%)	(5)	(0%)	\$58,379
52	Finance & Insurance	965	874	817	(91)	(9%)	(57)	(7%)	\$59,812
99	Unclassified Industry	30	27	<10	(3)	(10%)	Insf. Data	Insf. Data	\$24,596
48	Transportation & Warehousing	1,239	1,113	1,178	(126)	(10%)	65	6%	\$53,115
54	Professional, Scientific, & Technical Services	1,195	1,073	1,111	(122)	(10%)	38	4%	\$59,794
31	Manufacturing	10,005	8,913	8,239	(1,092)	(11%)	(674)	(8%)	\$71,151
44	Retail Trade	7,179	6,328	5,806	(851)	(12%)	(522)	(8%)	\$31,958
81	Other Services (except Public Admin.)	2,867	2,404	2,370	(463)	(16%)	(34)	(1%)	\$26,527
53	Real Estate & Rental & Leasing	605	462	409	(143)	(24%)	(53)	(11%)	\$41,733
55	Management of Companies & Enterprises	238	170	33	(68)	(29%)	(137)	(81%)	\$35,105
51	Information	729	491	306	(238)	(33%)	(185)	(38%)	\$45,433
22	Utilities	315	199	195	(116)	(37%)	(4)	(2%)	\$117,384
21	Mining, Quarrying, and Oil & Gas Extraction	255	92	102	(163)	(64%)	10	11%	\$51,891
Total		57,112	52,640	52,759	(4,472)	(8%)	119	0%	\$51,023

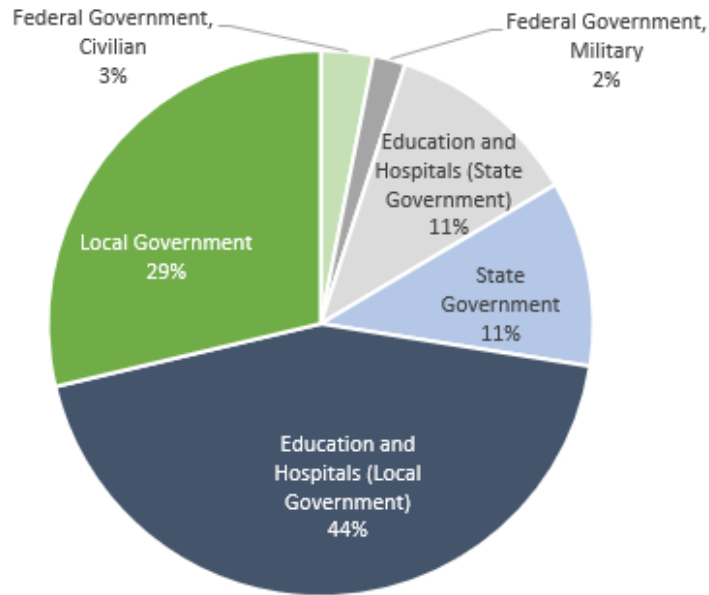
Source: EMSI

Chautauqua County, New York

Approximately 55% of jobs in the Government sector are related to education and hospitals (both state and local). The remainder is split between state, local, and federal government jobs.

Figure 9: Chautauqua County Government Employment by Sector, 2019

Chautauqua County Government Employment by Sector, 2019



Source: EMSI

Chautauqua County, New York

REGIONAL COMPARISON

The tables below and on the following page show historical and projected change in 2-digit NAICS codes for the 5-county Western New York Region and New York State. Government, and Health Care and Social Assistance all share the largest market segments within each comparison geography. Approximately 50% of the Government jobs are related to education and hospitals.

Table 15 (Western New York) and Table 16 (New York State) are sorted by industry, while Table 17 (Western New York) and Table 18 (New York State) are organized by historical percentage change to clearly depict which industries grew at the fastest rate over the last decade. The fastest growing industries in Western New York include: Arts, Entertainment, and Recreation (25%); followed by Transportation and Warehousing (17%), and Accommodation and Food Services (17%).¹¹ In New York State, the largest percent gains in the last ten years were in Accommodation and Food Services (36%); Administrative and Support and Waste Management Remediation Services (27%); and Transportation and Warehousing (25%).

¹¹ Note that NAICS 99 Unclassified Industry was removed from Table 16 as it contained such a small proportion of total jobs.

Chautauqua County, New York

Table 15: Employment by Sector, 2-Digit NAICS, Western NY

Employment by Sector, 2-Digit NAICS - Western NY									
NAICS	Description	2009 Jobs	2019 Jobs	2029 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 - 2029 Change	2019 - 2029 % Change	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing & Hunting	4,115	4,138	4,204	23	1%	66	2%	\$40,812
21	Mining, Quarrying, & Oil & Gas Extraction	787	445	437	(342)	(43%)	(8)	(2%)	\$72,518
22	Utilities	2,471	1,625	1,539	(846)	(34%)	(86)	(5%)	\$134,475
23	Construction	26,128	26,965	27,744	837	3%	779	3%	\$63,258
31	Manufacturing	67,507	66,536	63,514	(971)	(1%)	(3,022)	(5%)	\$81,452
42	Wholesale Trade	22,560	21,655	20,843	(905)	(4%)	(812)	(4%)	\$73,599
44	Retail Trade	74,880	73,289	71,520	(1,591)	(2%)	(1,769)	(2%)	\$33,227
48	Transportation & Warehousing	16,750	19,630	21,499	2,880	17%	1,869	10%	\$54,668
51	Information	9,336	8,293	8,289	(1,043)	(11%)	(4)	(0%)	\$71,639
52	Finance & Insurance	28,182	32,439	35,971	4,257	15%	3,532	11%	\$79,973
53	Real Estate & Rental & Leasing	8,473	9,058	9,447	585	7%	389	4%	\$52,211
54	Professional, Scientific, & Technical Services	32,169	32,800	35,694	631	2%	2,894	9%	\$76,326
55	Management of Companies & Enterprises	11,726	13,192	15,133	1,466	13%	1,941	15%	\$107,434
56	Administrative & Support & Waste Management & Remediation Services	35,188	31,799	30,608	(3,389)	(10%)	(1,191)	(4%)	\$41,785
61	Educational Services	20,470	21,177	23,262	707	3%	2,085	10%	\$37,270
62	Health Care & Social Assistance	87,886	96,472	111,236	8,586	10%	14,764	15%	\$55,429
71	Arts, Entertainment, & Recreation	9,672	12,101	13,622	2,429	25%	1,521	13%	\$55,494
72	Accommodation & Food Services	52,124	60,809	64,907	8,685	17%	4,098	7%	\$21,809
81	Other Services (except Public Admin.)	29,059	29,692	30,970	633	2%	1,278	4%	\$30,167
90	Government	122,038	113,575	114,639	(8,463)	(7%)	1,064	1%	\$88,186
99	Unclassified Industry	443	596	321	153	35%	(275)	(46%)	\$36,643
Total		661,962	676,286	705,400	14,324	2%	29,114	4%	\$60,072

Source: EMSI

Chautauqua County, New York

Table 16: Employment by Sector, 2-Digit NAICS, New York

Employment by Sector, 2-Digit NAICS - New York									
NAICS	Description	2009 Jobs	2019 Jobs	2029 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 - 2029 Change	% Change 2009 - 2019	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing & Hunting	42,625	43,800	45,665	1,175	3%	1,865	4%	\$44,036
21	Mining, Quarrying, & Oil & Gas Extraction	4,915	4,854	5,049	(61)	(1%)	195	4%	\$85,413
22	Utilities	39,221	37,697	42,083	(1,524)	(4%)	4,386	12%	\$164,463
23	Construction	429,404	491,925	550,499	62,521	15%	58,574	12%	\$78,507
31	Manufacturing	487,559	453,568	428,308	(33,991)	(7%)	(25,260)	(6%)	\$84,338
42	Wholesale Trade	341,043	337,258	331,003	(3,785)	(1%)	(6,255)	(2%)	\$100,151
44	Retail Trade	905,964	961,074	979,687	55,110	6%	18,613	2%	\$43,543
48	Transportation & Warehousing	268,231	336,583	373,838	68,352	25%	37,255	11%	\$60,462
51	Information	267,467	293,762	324,827	26,295	10%	31,065	11%	\$144,408
52	Finance & Insurance	526,937	550,187	577,406	23,250	4%	27,219	5%	\$256,060
53	Real Estate & Rental & Leasing	211,283	228,764	241,499	17,481	8%	12,735	6%	\$82,525
54	Professional, Scientific, & Technical Services	660,641	776,172	850,520	115,531	17%	74,348	10%	\$126,214
55	Management of Companies & Enterprises	130,636	144,417	149,532	13,781	11%	5,115	4%	\$173,389
56	Administrative & Support & Waste Management & Remediation Services	442,479	561,482	638,534	119,003	27%	77,052	14%	\$61,815
61	Educational Services	383,656	459,255	536,119	75,599	20%	76,864	17%	\$62,101
62	Health Care & Social Assistance	1,363,988	1,659,756	2,037,908	295,768	22%	378,152	23%	\$62,606
71	Arts, Entertainment, & Recreation	185,674	225,899	251,298	40,225	22%	25,399	11%	\$59,519
72	Accommodation & Food Services	583,978	791,499	892,912	207,521	36%	101,413	13%	\$33,804
81	Other Services (except Public Administration)	440,608	488,396	527,726	47,788	11%	39,330	8%	\$42,062
90	Government	1,547,197	1,514,997	1,649,816	(32,200)	(2%)	134,819	9%	\$104,883
99	Unclassified Industry	23,406	23,861	18,259	455	2%	(5,602)	(23%)	\$71,480
Total		9,286,913	10,385,205	11,452,490	1,098,292	12%	1,067,285	10%	\$86,186

Source: EMSI

Chautauqua County, New York

Table 17: Employment by Historical Percent Change, Western NY

Employment by Sector, 2-Digit NAICS - Western NY									
NAICS	Description	2009 Jobs	2019 Jobs	2029 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 - 2029 Change	% Change 2019 - 2029	Avg. Earnings Per Job
71	Arts, Entertainment, & Recreation	9,672	12,101	13,622	2,429	25%	1,521	13%	\$55,494
48	Transportation & Warehousing	16,750	19,630	21,499	2,880	17%	1,869	10%	\$54,668
72	Accommodation & Food Services	52,124	60,809	64,907	8,685	17%	4,098	7%	\$21,809
52	Finance & Insurance	28,182	32,439	35,971	4,257	15%	3,532	11%	\$79,973
55	Management of Companies & Enterprises	11,726	13,192	15,133	1,466	13%	1,941	15%	\$107,434
62	Health Care & Social Assistance	87,886	96,472	111,236	8,586	10%	14,764	15%	\$55,429
53	Real Estate & Rental & Leasing	8,473	9,058	9,447	585	7%	389	4%	\$52,211
61	Educational Services	20,470	21,177	23,262	707	3%	2,085	10%	\$37,270
23	Construction	26,128	26,965	27,744	837	3%	779	3%	\$63,258
81	Other Services (except Public Administration)	29,059	29,692	30,970	633	2%	1,278	4%	\$30,167
54	Professional, Scientific, & Technical Services	32,169	32,800	35,694	631	2%	2,894	9%	\$76,326
11	Agriculture, Forestry, Fishing & Hunting	4,115	4,138	4,204	23	1%	66	2%	\$40,812
31	Manufacturing	67,507	66,536	63,514	(971)	(1%)	(3,022)	(5%)	\$81,452
44	Retail Trade	74,880	73,289	71,520	(1,591)	(2%)	(1,769)	(2%)	\$33,227
42	Wholesale Trade	22,560	21,655	20,843	(905)	(4%)	(812)	(4%)	\$73,599
90	Government	122,038	113,575	114,639	(8,463)	(7%)	1,064	1%	\$88,186
56	Administrative & Support & Waste Management & Remediation Services	35,188	31,799	30,608	(3,389)	(10%)	(1,191)	(4%)	\$41,785
51	Information	9,336	8,293	8,289	(1,043)	(11%)	(4)	(0%)	\$71,639
22	Utilities	2,471	1,625	1,539	(846)	(34%)	(86)	(5%)	\$134,475
21	Mining, Quarrying, & Oil and Gas Extraction	787	445	437	(342)	(43%)	(8)	(2%)	\$72,518
Total		661,962	676,286	705,400	14,324	2%	29,114	4%	\$60,072

Chautauqua County, New York

Table 18: Employment by Historical Percentage Change, New York

Employment by Sector, 2-Digit NAICS - New York									
NAICS	Description	2009 Jobs	2019 Jobs	2029 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 - 2029 Change	% Change 2009 - 2019	Avg. Earnings Per Job
72	Accommodation & Food Services	583,978	791,499	892,912	207,521	36%	101,413	13%	\$33,804
56	Administrative & Support & Waste Management & Remediation Services	442,479	561,482	638,534	119,003	27%	77,052	14%	\$61,815
48	Transportation & Warehousing	268,231	336,583	373,838	68,352	25%	37,255	11%	\$60,462
62	Health Care & Social Assistance	1,363,988	1,659,756	2,037,908	295,768	22%	378,152	23%	\$62,606
71	Arts, Entertainment, & Recreation	185,674	225,899	251,298	40,225	22%	25,399	11%	\$59,519
61	Educational Services	383,656	459,255	536,119	75,599	20%	76,864	17%	\$62,101
54	Professional, Scientific, & Technical Services	660,641	776,172	850,520	115,531	17%	74,348	10%	\$126,214
23	Construction	429,404	491,925	550,499	62,521	15%	58,574	12%	\$78,507
81	Other Services (except Public Administration)	440,608	488,396	527,726	47,788	11%	39,330	8%	\$42,062
55	Management of Companies & Enterprises	130,636	144,417	149,532	13,781	11%	5,115	4%	\$173,389
51	Information	267,467	293,762	324,827	26,295	10%	31,065	11%	\$144,408
53	Real Estate & Rental & Leasing	211,283	228,764	241,499	17,481	8%	12,735	6%	\$82,525
44	Retail Trade	905,964	961,074	979,687	55,110	6%	18,613	2%	\$43,543
52	Finance & Insurance	526,937	550,187	577,406	23,250	4%	27,219	5%	\$256,060
11	Agriculture, Forestry, Fishing & Hunting	42,625	43,800	45,665	1,175	3%	1,865	4%	\$44,036
99	Unclassified Industry	23,406	23,861	18,259	455	2%	(5,602)	(23%)	\$71,480
42	Wholesale Trade	341,043	337,258	331,003	(3,785)	(1%)	(6,255)	(2%)	\$100,151
21	Mining, Quarrying, & Oil & Gas Extraction	4,915	4,854	5,049	(61)	(1%)	195	4%	\$85,413
90	Government	1,547,197	1,514,997	1,649,816	(32,200)	(2%)	134,819	9%	\$104,883
22	Utilities	39,221	37,697	42,083	(1,524)	(4%)	4,386	12%	\$164,463
31	Manufacturing	487,559	453,568	428,308	(33,991)	(7%)	(25,260)	(6%)	\$84,338
Total		9,286,913	10,385,205	11,452,490	1,098,292	12%	1,067,285	10%	\$86,186

Source: EMSI

Chautauqua County, New York

SUBREGION COMPARISON IN WESTERN NEW YORK

Table 19 reveals the distinction between growth within the more urbanized Western New York counties, Erie and Niagara counties, and the more rural counties (Chautauqua, Cattaraugus, and Allegany). Jobs grew by a total of 4% (about 22,127) in Erie and Niagara Counties over the last decade, while jobs in the three other counties decreased by 7% (7,804 jobs). The unemployment rate is nominally different among the subregions, while average earnings per job are about \$10,762 higher in Erie and Niagara counties compared to the three other rural counties. Table 20 reveals the

Table 19: Subregion Comparison - WNY Counties

Subregion Comparison - WNY Counties				
	2009 - 2019 # Job Change	2009-2019 % Job Change	Unemployment Rate*	Avg. Earnings per Job
Erie and Niagara	22,127	4%	4.3%	\$61,669
Chautauqua, Cattaraugus, Allegany	(7,804)	(7%)	4.5%	\$50,907

Source: EMSI

*as of July 2019

distinction between growth within the more urbanized Western New York counties, Erie and Niagara counties, and the more rural counties (Chautauqua, Cattaraugus, and Allegany). Jobs grew by a total of 4% (about 22,127) in Erie and Niagara Counties over the last decade, while jobs in the three other counties decreased by 7% (7,804 jobs). The unemployment rate is nominally different among the subregions, while average earnings per job are about \$10,762 higher in Erie and Niagara counties compared to the three other rural counties. Table 20 reveals the distinction between growth within the more urbanized Western New York counties, Erie and Niagara counties, and the more rural counties (Chautauqua, Cattaraugus, and Allegany). Jobs grew by a total of 4% (about 22,127) in Erie and Niagara Counties over the last decade, while jobs in the three other counties decreased by 7% (7,804 jobs). The unemployment rate is nominally different among the subregions, while average earnings per job are about \$10,762 higher in Erie and Niagara counties compared to the three other rural counties.

Chautauqua County, New York

Table 20: Subregion Comparison - WNY Counties

Subregion Comparison - WNY Counties					
NAICS	Description	Erie and Niagara		Chautauqua, Cattaraugus, Allegany	
		2009-2019 # Change	2009-2019 % Job Change	2009-2019 # Change	2009-2019 % Job Change
11	Agriculture, Forestry, Fishing & Hunting	71	3%	(49)	(3%)
21	Mining, Quarrying, & Oil & Gas Extraction	(68)	(24%)	(273)	(54%)
22	Utilities	(678)	(34%)	(168)	(34%)
23	Construction	1,068	5%	(232)	(6%)
31	Manufacturing	1,502	3%	(2,472)	(15%)
42	Wholesale Trade	(623)	(3%)	(282)	(13%)
44	Retail Trade	(31)	(0%)	(1,561)	(12%)
48	Transportation & Warehousing	3,015	20%	(134)	(7%)
51	Information	(751)	(9%)	(293)	(27%)
52	Finance & Insurance	4,312	16%	(54)	(3%)
53	Real Estate & Rental & Leasing	756	10%	(171)	(18%)
54	Professional, Scientific, & Technical Services	711	2%	(79)	(4%)
55	Management of Companies & Enterprises	1,642	15%	(176)	(35%)
56	Administrative & Support; Waste Mgmt. & Remediation Services	(3,186)	(10%)	(203)	(6%)
61	Educational Services	866	6%	(159)	(3%)
62	Health Care & Social Assistance	8,991	12%	(405)	(3%)
71	Arts, Entertainment, and Recreation	2,220	26%	209	16%
72	Accommodation & Food Services	8,254	19%	431	5%
81	Other Services (except Public Administration)	1,093	5%	(460)	(9%)
90	Government	(7,186)	(7%)	(1,277)	(5%)
99	Unclassified Industry	149	38%	4	7%
Average		22,127	4%	(7,804)	(7%)

Source: EMSI

HIGHLY CONCENTRATED SECTORS

Location quotient (LQ) is a measure of industry concentration, indicating how concentrated a certain sector is in a given area of study relative to the nation. It may reveal what makes a particular region “unique” in comparison with the national average. An LQ greater than 1 indicates that sector employment in the study area is more concentrated than it is at the national level.

In Chautauqua County, the sector with the highest concentration is Manufacturing with an LQ of 2.14, meaning that the share of Manufacturing employment in Chautauqua County is 2.14 times greater than its share nationally (Refer to Table 21). Other concentrated sectors include Agriculture, Forestry, Fishing and Hunting (LQ=1.50), and Government (LQ=1.25).

Manufacturing is more highly concentrated in Chautauqua county than in the other Western NY counties. This sector has a location quotient of 1.28 in Cattaraugus County, 1.49 in Niagara County, 1.10 in Erie County, and 1.45 in Allegany County.

Chautauqua County, New York

Table 21: 2019 Location Quotient by Sector, 2-Digit NAICS

2019 Location Quotient by Sector, 2-Digit NAICS				
NAICS	Description	Chautauqua County	Western NY	New York
11	Agriculture, Forestry, Fishing & Hunting	1.50	0.53	0.36
21	Mining, Quarrying, & Oil & Gas Extraction	0.41	0.16	0.11
22	Utilities	1.11	0.71	1.07
23	Construction	0.75	0.71	0.84
31	Manufacturing	2.14	1.24	0.55
42	Wholesale Trade	0.58	0.87	0.89
44	Retail Trade	1.20	1.08	0.92
48	Transportation & Warehousing	0.57	0.79	0.88
51	Information	0.51	0.67	1.55
52	Finance & Insurance	0.41	1.20	1.32
53	Real Estate & Rental & Leasing	0.52	0.79	1.30
54	Professional, Scientific, & Technical Services	0.31	0.74	1.14
55	Management of Companies & Enterprises	0.22	1.35	0.97
56	Administrative and Support & Waste Management & Remediation Services	0.57	0.75	0.87
61	Educational Services	0.55	1.22	1.72
62	Health Care & Social Assistance	1.20	1.12	1.26
71	Arts, Entertainment, & Recreation	0.96	1.03	1.25
72	Accommodation & Food Services	1.08	1.05	0.89
81	Other Services (except Public Admin.)	0.96	0.93	0.99
90	Government	1.25	1.12	0.97
99	Unclassified Industry	0.60	1.03	2.70

Source: EMSI

REGIONAL COMPARISON OF EMPLOYMENT SHARE BY SECTOR

Table 22 summarizes each sector's share of total employment in Chautauqua County, the Western New York Region, and New York. Notably, the proportion of Manufacturing jobs in Chautauqua County is more than seven percentage points higher than that of the region or state. Additionally, the county has a lower proportion of Government jobs than the other geographies. There is a similar proportion of employment share by sector across the other sectors.

Chautauqua County, New York

Table 22: 2019 Employment Share by Sector, Regional Comparison

2019 Employment Share by Sector, Regional Comparison				
NAICS	Description	Chautauqua County	Western NY	New York
11	Agriculture, Forestry, Fishing & Hunting	2%	1%	8%
21	Mining, Quarrying, & Oil & Gas Extraction	0%	0%	5%
22	Utilities	0%	0%	3%
23	Construction	4%	4%	16%
31	Manufacturing	17%	10%	2%
42	Wholesale Trade	2%	3%	4%
44	Retail Trade	12%	11%	7%
48	Transportation & Warehousing	2%	3%	5%
51	Information	1%	1%	5%
52	Finance & Insurance	2%	5%	1%
53	Real Estate & Rental & Leasing	1%	1%	3%
54	Professional, Scientific, & Technical Services	2%	5%	2%
55	Management of Companies & Enterprises	0%	2%	9%
56	Administrative & Support & Waste Management & Remediation Services	4%	5%	5%
61	Educational Services	1%	3%	0%
62	Health Care & Social Assistance	15%	14%	0%
71	Arts, Entertainment, & Recreation	2%	2%	3%
72	Accommodation & Food Services	9%	9%	0%
81	Other Services (except Public Admin.)	5%	4%	15%
90	Government	19%	17%	0%
99	Unclassified Industry	0%	0%	4%
Total		100%	100%	100%

Source: EMSI

HISTORIC EMPLOYMENT GROWTH BY SECTOR

Chautauqua County, New York

Economy-wide employment in Chautauqua County contracted by 8% over the last decade. Employment in Western New York and the state increased by 2% and 12% respectively. Notably, Chautauqua County's employment in Accommodation and Food Services contracted by 5%, while the industry grew by 17% and 36% in the region and state (Refer to Table 23).

Agriculture, Forestry, Fishing and Hunting, one of the two industries which experienced positive growth in Chautauqua County, grew by 6% while the pace of growth was slower in Western New York and New York State (1% and 3%).

Table 23: 2009-2019 Percent Change in Employment, Regional Comparison

2009-2019 Percent Change in Employment, Regional Comparison				
NAICS	Description	Chautauqua County	Western NY	New York
11	Agriculture, Forestry, Fishing & Hunting	6%	1%	36%
21	Mining, Quarrying, & Oil & Gas Extraction	(64%)	(43%)	27%
22	Utilities	(37%)	(34%)	25%
23	Construction	(2%)	3%	22%
31	Manufacturing	(11%)	(1%)	22%
42	Wholesale Trade	(8%)	(4%)	20%
44	Retail Trade	(12%)	(2%)	17%
48	Transportation & Warehousing	(10%)	17%	15%
51	Information	(33%)	(11%)	11%
52	Finance & Insurance	(9%)	15%	11%
53	Real Estate & Rental & Leasing	(24%)	7%	10%
54	Professional, Scientific, & Technical Services	(10%)	2%	8%
55	Management of Companies & Enterprises	(29%)	13%	6%
56	Administrative & Support & Waste Management & Remediation Services	(6%)	(10%)	4%
61	Educational Services	(4%)	3%	3%
62	Health Care & Social Assistance	(1%)	10%	2%
71	Arts, Entertainment, & Recreation	10%	25%	(1%)
72	Accommodation & Food Services	(5%)	17%	(1%)
81	Other Services (except Public Administration)	(16%)	2%	(2%)
90	Government	(5%)	(7%)	(4%)
99	Unclassified Industry	(10%)	35%	(7%)
All Sectors		(8%)	2%	12%

Source: EMSI

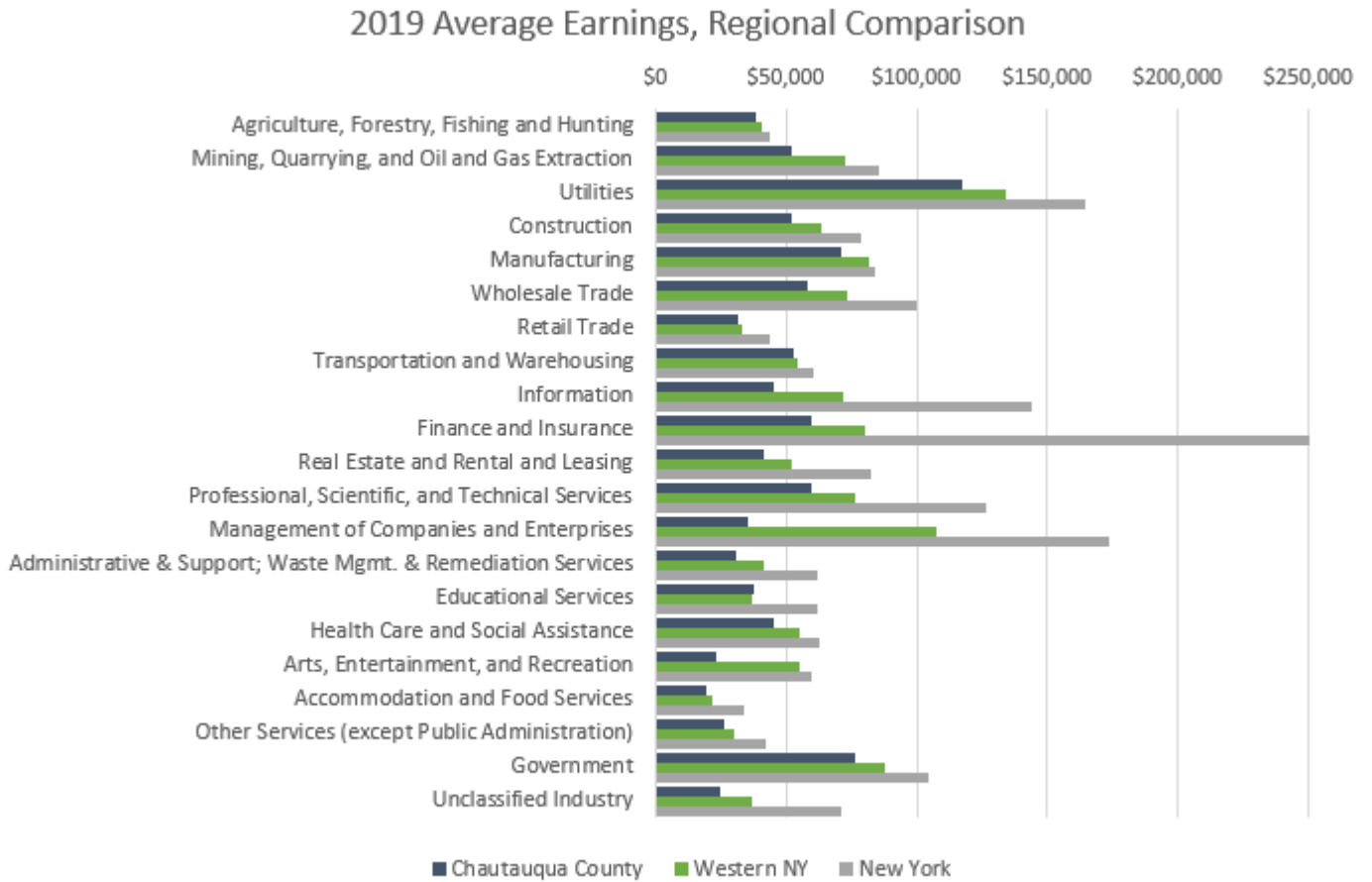
Chautauqua County, New York

AVERAGE EARNINGS BY SECTOR

Average earnings per job in Chautauqua County (\$51,023) is lower than the Western New York Region (\$60,072) and New York State (\$86,186).

As previously stated, Chautauqua County’s top sectors by number of jobs are Government; Manufacturing; and Health Care and Social Assistance. Earnings in all three sectors are lowest in Chautauqua County and highest in New York State (Refer to Figure 10). Educational Services is the only industry where average earnings are higher than Western New York, albeit only slightly (\$37,995 vs. \$37,270).

Figure 10: 2019 Average Earnings, Regional Comparison



Source: EMSI

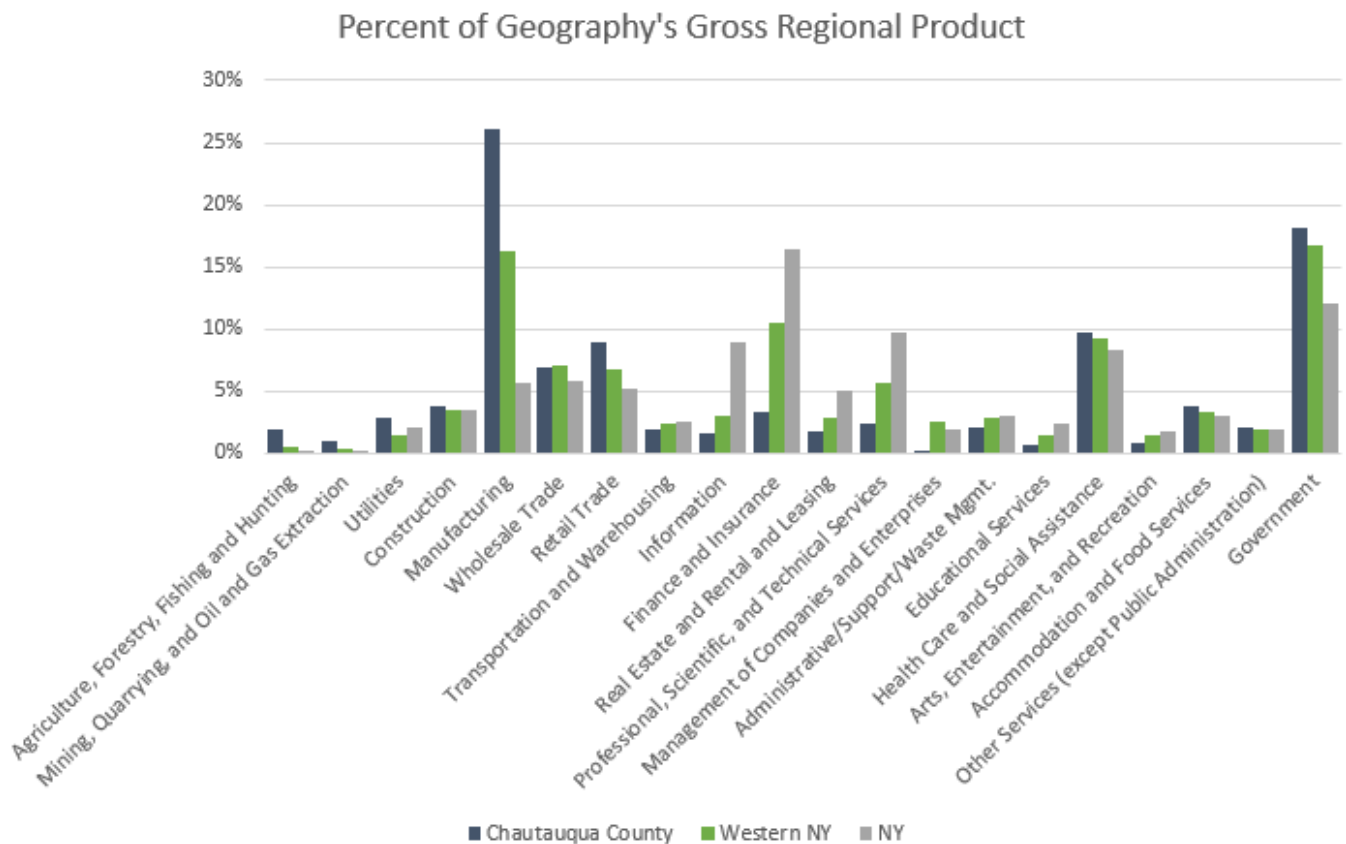
Chautauqua County, New York

GROSS REGIONAL PRODUCT BY SECTOR (2-DIGIT NAICS)

Within Chautauqua County, the industries contributing the most to gross regional product (GRP) in descending order are Manufacturing (26% of total GRP); Government (18% of total GRP); and Health Care and Social Assistance (10% of total GRP).

As Figure 11 and Table 24 illustrate, Manufacturing is a much higher proportion of Chautauqua County's GRP than the region or state. Additionally, Finance and Insurance is a significantly smaller portion of the county's GRP (3%) compared with the region (10%) and state (17%).

Figure 11: Percent of Geography's Gross Regional Product



Source: EMSI

Chautauqua County, New York

Table 24: Gross Regional Product by 2-Digit Sector

Gross Regional Product by 2-Digit Sector					
NAICS	Description	Chautauqua County GRP	% of Total GRP Chautauqua County	% of Total GRP Western NY	% of Total GRP NY
11	Agriculture, Forestry, Fishing & Hunting	\$89,197,907	2%	1%	0%
21	Mining, Quarrying, & Oil & Gas Extraction	\$42,223,561	1%	0%	0%
22	Utilities	\$129,825,364	3%	1%	2%
23	Construction	\$175,169,181	4%	4%	3%
31	Manufacturing	\$1,198,474,822	26%	16%	6%
42	Wholesale Trade	\$317,938,445	7%	7%	6%
44	Retail Trade	\$411,583,458	9%	7%	5%
48	Transportation & Warehousing	\$89,097,627	2%	2%	3%
51	Information	\$76,723,210	2%	3%	9%
52	Finance & Insurance	\$155,608,037	3%	10%	17%
53	Real Estate & Rental & Leasing	\$77,826,074	2%	3%	5%
54	Professional, Scientific, & Technical Services	\$110,574,734	2%	6%	10%
55	Management of Companies & Enterprises	\$7,907,895	0%	3%	2%
56	Administrative/Support/Waste Mgmt.	\$92,028,866	2%	3%	3%
61	Educational Services	\$31,141,317	1%	1%	2%
62	Health Care & Social Assistance	\$446,007,456	10%	9%	8%
71	Arts, Entertainment, & Recreation	\$36,270,776	1%	2%	2%
72	Accommodation & Food Services	\$171,371,443	4%	3%	3%
81	Other Services (except Public Administration)	\$92,442,425	2%	2%	2%
90	Government	\$830,784,919	18%	17%	12%
Total		\$4,582,197,517	100%	100%	100%

Source: EMSI

Chautauqua County, New York

TOP INDUSTRIES (4-DIGIT NAICS)

Table 25 depicts the top 25 industries by employment for Chautauqua County. Five of these are from the Health Care and Social Assistance Sector, four are within the Government sector, and four are within the Manufacturing sector. Education and Hospitals (Local Government) has the most jobs in the county, with more than 4,300 in 2019 (down 12% over the last 10 years). This is followed by Restaurants and Other Eating Places, which has over 3,300 jobs, and Local Government (excluding Education and Hospitals) which has more than 2,800 jobs. Both of these industries have contracted more than the last 10-years. Nearly 45% of the top 25 industry sectors have seen a decline in the number of jobs from 2009 to 2019.

The industries that have seen growth and have an LQ above 1.5 include the following:

- ◆ **Engine, Turbine, and Power Transmission Equipment Manufacturing;**
- ◆ **Nursing Care Facilities;**
- ◆ **Dairy Product Manufacturing;**
- ◆ **Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities;**
and
- ◆ **Motor Vehicle Parts Manufacturing.**

Chautauqua County, New York

Table 25: Top 25 Industries by Employment, 4-Digit NAICS, Chautauqua County

Top 25 Industries by Employment, 4-Digit NAICS - Chautauqua County							
NAICS	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	2009 - 2019 % Change	2019 Location Quotient	Avg. Earnings Per Job
9036	Education & Hospitals (Local Government)	4,922	4,308	(614)	(12%)	1.56	\$75,194
7225	Restaurants & Other Eating Places	3,825	3,328	(497)	(13%)	0.96	\$19,246
9039	Local Government, Excluding Education & Hospitals	3,364	2,822	(542)	(16%)	1.53	\$72,718
6221	General Medical & Surgical Hospitals	2,310	1,649	(661)	(29%)	1.09	\$51,386
3336	Engine, Turbine, & Power Transmission Equipment Manufacturing	1,377	1,503	126	9%	46.96	\$93,056
6231	Nursing Care Facilities (Skilled Nursing Facilities)	1,200	1,407	207	17%	2.73	\$37,082
4451	Grocery Stores	1,283	1,221	(62)	(5%)	1.40	\$27,223
9026	Education & Hospitals (State Government)	645	1,128	483	75%	1.12	\$72,328
9029	State Government, Excluding Education & Hospitals	835	1,081	246	29%	1.49	\$104,267
4523	General Merchandise Stores, including Warehouse Clubs & Supercenters	1,198	971	(227)	(19%)	1.53	\$31,786
7211	Traveler Accommodation	879	850	(29)	(3%)	1.35	\$21,796
6211	Offices of Physicians	790	830	40	5%	0.96	\$92,188
3115	Dairy Product Manufacturing	322	738	416	129%	15.38	\$60,860
5613	Employment Services	466	692	226	48%	0.59	\$26,533
6232	Residential Intellectual & Developmental Disability, Mental Health, & Substance Abuse Facilities	649	688	39	6%	3.31	\$35,654
8131	Religious Organizations	701	670	(31)	(4%)	1.18	\$22,506
5617	Services to Buildings & Dwellings	490	640	150	31%	0.69	\$27,982
7139	Other Amusement & Recreation Industries	611	637	26	4%	1.35	\$18,536
3329	Other Fabricated Metal Product Manufacturing	1,033	631	(402)	(39%)	7.02	\$86,906
3363	Motor Vehicle Parts Manufacturing	527	627	100	19%	3.22	\$72,303
4471	Gasoline Stations	606	581	(25)	(4%)	1.92	\$28,742
6241	Individual & Family Services	554	566	12	2%	0.66	\$35,874
3323	Architectural & Structural Metals Manufacturing	707	562	(145)	(21%)	4.40	\$71,819
2382	Building Equipment Contractors	559	561	2	0%	0.71	\$62,193
4411	Automobile Dealers	522	547	25	5%	1.28	\$49,041

Source: EMSI

Chautauqua County, New York

REGIONAL COMPARISON OF TOP INDUSTRIES

Table 26 and Table 27 display the top 25 industries for the Western NY Region and the state. The Western NY Region and Chautauqua County share all but five of the same top industries. These are concentrated in the Manufacturing sector and include the Engine, Turbine, and Power Transmission Equipment Manufacturing; Dairy Product Manufacturing; Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities; Motor Vehicle Parts Manufacturing; Gasoline Stations; and Architectural and Structural Metals Manufacturing. New York and Chautauqua County share the same top four industries, based on 2019 jobs statistics.

Table 26: Top 25 Industries by Employment, 4-Digit NAICS, Western NY

Top 25 Industries by Employment, 4-Digit NAICS - Western NY							
NAICS	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 Location Quotient	Avg. Earnings Per Job
7225	Restaurants & Other Eating Places	39,645	45,536	5,891	15%	1.02	\$21,345
9036	Education & Hospitals (Local Government)	46,699	42,783	(3,916)	(8%)	1.20	\$87,412
9039	Local Government, Excluding Education & Hospitals	34,225	32,091	(2,134)	(6%)	1.36	\$75,302
6221	General Medical & Surgical Hospitals	19,573	18,801	(772)	(4%)	0.97	\$73,297
4451	Grocery Stores	15,988	15,526	(462)	(3%)	1.38	\$26,866
9026	Education & Hospitals (State Government)	15,186	14,879	(307)	(2%)	1.15	\$103,153
5511	Management of Companies & Enterprises	11,726	13,192	1,466	13%	1.35	\$107,434
6211	Offices of Physicians	11,870	13,127	1,257	11%	1.19	\$101,815
5221	Depository Credit Intermediation	10,095	12,015	1,920	19%	1.68	\$75,845
9029	State Government, Excluding Education & Hospitals	12,423	11,396	(1,027)	(8%)	1.22	\$103,186
6241	Individual & Family Services	6,814	11,364	4,550	67%	1.03	\$32,495
6231	Nursing Care Facilities (Skilled Nursing Facilities)	11,522	10,864	(658)	(6%)	1.64	\$41,984
6113	Colleges, Universities, & Professional Schools	10,407	10,704	297	3%	1.30	\$35,271
9011	Federal Government, Civilian	10,936	10,114	(822)	(8%)	0.85	\$107,416
5241	Insurance Carriers	6,758	8,814	2,056	30%	1.68	\$84,179
5613	Employment Services	10,589	8,633	(1,956)	(18%)	0.57	\$38,803
2382	Building Equipment Contractors	7,183	8,393	1,210	17%	0.83	\$70,837
5617	Services to Buildings & Dwellings	6,947	8,178	1,231	18%	0.68	\$29,101
5242	Agencies, Brokerages, & Other Insurance Related Activities	5,960	7,561	1,601	27%	1.15	\$67,054
4523	General Merchandise Stores, including Warehouse Clubs & Supercenters	5,250	7,147	1,897	36%	0.88	\$28,972
4411	Automobile Dealers	5,627	6,780	1,153	20%	1.23	\$60,323
6111	Elementary & Secondary Schools	6,197	6,666	469	8%	1.38	\$44,796
7211	Traveler Accommodation	5,185	6,648	1,463	28%	0.82	\$25,233
8131	Religious Organizations	7,221	6,641	(580)	(8%)	0.91	\$22,305
7139	Other Amusement & Recreation Industries	5,601	6,456	855	15%	1.07	\$21,733

Source: EMSI

Chautauqua County, New York

Table 27: Top 25 Industries by Employment, 4-Digit NAICS, New York

Top 25 Industries by Employment, 4-Digit NAICS - New York							
NAICS	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 Location Quotient	Avg. Earnings Per Job
9036	Education & Hospitals (Local Government)	621,779	615,721	(6,058)	(1%)	1.13	\$101,710
7225	Restaurants & Other Eating Places	430,732	593,238	162,506	38%	0.87	\$30,174
9039	Local Government, Excluding Education & Hospitals	484,015	485,639	1,624	0%	1.34	\$113,077
6221	General Medical & Surgical Hospitals	325,278	355,181	29,903	9%	1.19	\$93,952
6113	Colleges, Universities, & Professional Schools	226,717	265,828	39,111	17%	2.10	\$70,361
6241	Individual & Family Services	199,524	254,648	55,124	28%	1.51	\$36,110
6216	Home Health Care Services	110,103	246,843	136,740	124%	2.50	\$35,872
5613	Employment Services	122,612	194,041	71,429	58%	0.84	\$67,167
4451	Grocery Stores	167,837	181,301	13,464	8%	1.05	\$32,485
6211	Offices of Physicians	153,011	166,909	13,898	9%	0.98	\$112,725
2382	Building Equipment Contractors	123,032	154,561	31,529	26%	0.99	\$86,509
9029	State Government, Excluding Education & Hospitals	167,757	154,203	(13,554)	(8%)	1.08	\$116,287
5511	Management of Companies & Enterprises	130,636	144,417	13,781	11%	0.97	\$173,389
5411	Legal Services	145,973	143,314	(2,659)	(2%)	1.69	\$150,125
5617	Services to Buildings & Dwellings	118,754	142,503	23,749	20%	0.77	\$41,186
5415	Computer Systems Design & Related Services	86,609	123,962	37,353	43%	0.84	\$144,700
6231	Nursing Care Facilities (Skilled Nursing Facilities)	130,041	121,970	(8,071)	(6%)	1.20	\$52,431
5221	Depository Credit Intermediation	97,390	116,137	18,747	19%	1.06	\$171,038
9011	Federal Government, Civilian	127,091	116,043	(11,048)	(9%)	0.63	\$111,143
5231	Securities & Commodity Contracts Intermediation & Brokerage	121,125	114,817	(6,308)	(5%)	3.92	\$430,158
6111	Elementary & Secondary Schools	86,165	109,367	23,202	27%	1.47	\$56,328
6244	Child Day Care Services	103,046	106,297	3,251	3%	1.33	\$28,746
5311	Lessors of Real Estate	105,895	105,763	(132)	(0%)	2.03	\$74,308
5416	Management, Scientific, & Technical Consulting Services	70,278	102,452	32,174	46%	0.88	\$141,487
7211	Traveler Accommodation	75,078	98,779	23,701	32%	0.80	\$56,122

Source: EMSI

Chautauqua County, New York

TOP OCCUPATIONS

Table 28 below highlights the top 25 occupations in Chautauqua County, sorted by 2009-2019 percent change. These represent occupations within all industry sectors at county businesses. [Top occupations by number of jobs include Food and Beverage Serving Workers; Retail Sales Workers; Other Personal Care and Service workers; and Preschool, Primary, Secondary, and Special Education School Teachers]. Occupations for which Chautauqua County showed highest concentrations between 2009 and 2019 include Metal Workers and Plastic Workers; Assemblers and Fabricators; Counselors, Social Workers, and Other Community and Social Service Specialists; and Nursing, Psychiatric, and Home Health Aides. Three of the top 25 occupations grew over the last decade, including Personal Care and Service Workers; Business Operations Specialists; and Counselors, Social Workers, and Other Community and Social Service Specialists.

Table 28: Top 25 Occupations by Employment, 3-Digit SOC, Chautauqua County

Top 25 Occupations by Employment, 3-Digit SOC - Chatauqua County							
SOC	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 Location Quotient	Avg. Hourly Earnings
39-9000	Other Personal Care & Service Workers	1,346	1,801	455	34%	1.19	\$13.97
13-1000	Business Operations Specialists	748	860	112	15%	0.48	\$30.84
21-1000	Counselors, Social Workers, & Other Community & Social Service Specialists	1,005	1,061	56	6%	1.45	\$22.08
29-2000	Health Technologists & Technicians	1,217	1,204	(13)	(1%)	1.16	\$19.06
29-1000	Health Diagnosing & Treating Practitioners	1,801	1,753	(48)	(3%)	0.96	\$41.36
35-3000	Food & Beverage Serving Workers	3,493	3,380	(113)	(3%)	1.36	\$12.56
37-2000	Building Cleaning & Pest Control Workers	1,632	1,561	(71)	(4%)	1.16	\$13.48
11-9000	Other Management Occupations	1,095	1,045	(50)	(5%)	0.82	\$36.74
49-9000	Other Installation, Maintenance, & Repair Occupations	1,308	1,234	(74)	(6%)	1.15	\$20.86
47-2000	Construction Trades Workers	1,657	1,560	(97)	(6%)	0.82	\$21.80
51-2000	Assemblers & Fabricators	1,222	1,148	(74)	(6%)	1.93	\$17.76
35-2000	Cooks & Food Preparation Workers	1,137	1,061	(76)	(7%)	0.99	\$12.88
43-5000	Material Recording, Scheduling, Dispatching, & Distributing Workers	1,666	1,543	(123)	(7%)	1.14	\$16.72
11-1000	Top Executives	871	797	(74)	(8%)	0.92	\$53.07
53-3000	Motor Vehicle Operators	1,764	1,599	(165)	(9%)	1.06	\$18.93
51-4000	Metal Workers & Plastic Workers	1,789	1,608	(181)	(10%)	2.45	\$19.87
41-2000	Retail Sales Workers	3,714	3,315	(399)	(11%)	1.16	\$12.89
43-6000	Secretaries & Administrative Assistants	1,331	1,167	(164)	(12%)	0.92	\$18.43
43-4000	Information & Record Clerks	1,896	1,598	(298)	(16%)	0.83	\$15.40
53-7000	Material Moving Workers	1,708	1,396	(312)	(18%)	0.85	\$16.06
43-9000	Other Office & Administrative Support Workers	1,518	1,232	(286)	(19%)	0.86	\$15.43
51-9000	Other Production Occupations	1,580	1,278	(302)	(19%)	1.50	\$18.96
25-2000	Preschool, Primary, Secondary, & Special Education School Teachers	2,248	1,793	(455)	(20%)	1.30	\$32.54
31-1000	Nursing, Psychiatric, & Home Health Aides	1,498	1,081	(417)	(28%)	1.36	\$13.82
43-3000	Financial Clerks	1,391	997	(394)	(28%)	0.97	\$17.38

Source: EMSI

Chautauqua County, New York

The replacement rate of the County's top 15 occupations is displayed in the Table 29 below. Replacements represent **jobs that will need to be filled by new hires due to existing workers leaving the occupation**. Food and Beverage Serving workers have the highest number of annual replacement jobs at over 600 (an annual replacement rate of 0.182). This is followed by Retail Sales Workers with over 570 annual replacement jobs (a rate of 0.160), and Other Personal Care and Service Workers with over 230 annual replacement jobs, (an annual replacement a rate of 0.148).

Table 29: Top 15 Occupations by Replacement Jobs, 3-Digit SOC, Chautauqua County

Top 15 Occupations by Replacement Jobs, 3-Digit SOC - Chautauqua County				
SOC	Description	2019 Jobs	Annual Replacement Jobs	Annual Replacement Rate
35-3000	Food & Beverage Serving Workers	3,380	609	0.182
41-2000	Retail Sales Workers	3,315	571	0.160
39-9000	Other Personal Care & Service Workers	1,801	234	0.148
43-4000	Information & Record Clerks	1,598	218	0.122
53-7000	Material Moving Workers	1,396	204	0.132
37-2000	Building Cleaning & Pest Control Workers	1,561	201	0.129
53-3000	Motor Vehicle Operators	1,599	179	0.109
51-4000	Metal Workers & Plastic Workers	1,608	177	0.103
43-5000	Material Recording, Scheduling, Dispatching, & Distributing Workers	1,543	170	0.107
51-9000	Other Production Occupations	1,278	170	0.118
35-2000	Cooks & Food Preparation Workers	1,061	160	0.148
43-9000	Other Office & Administrative Support Workers	1,232	159	0.114
47-2000	Construction Trades Workers	1,560	151	0.097
31-1000	Nursing, Psychiatric, & Home Health Aides	1,081	142	0.111
51-2000	Assemblers & Fabricators	1,148	139	0.114

Source: EMSI

Chautauqua County, New York

REGIONAL COMPARISON OF TOP OCCUPATIONS

The top occupations in the Western NY Region and the state are similar to Chautauqua County, which is revealed in Table 30 and 31 below.

Table 30: Top 25 Occupations by Employment, 3-Digit SOC, Western NY

Top 25 Occupations by Employment, 3-Digit SOC - Western NY							
SOC	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 Location Quotient	Avg. Hourly Earnings
35-3000	Food & Beverage Serving Workers	35,858	41,047	5,189	14%	1.29	\$12.71
41-2000	Retail Sales Workers	41,182	40,232	(950)	(2%)	1.10	\$13.09
43-4000	Information & Record Clerks	27,866	28,185	319	1%	1.14	\$17.20
29-1000	Health Diagnosing & Treating Practitioners	22,893	26,440	3,547	15%	1.12	\$46.58
39-9000	Other Personal Care & Service Workers	13,768	21,699	7,931	58%	1.11	\$13.46
25-2000	Preschool, Primary, Secondary, & Special Education School Teachers	23,959	20,801	(3,158)	(13%)	1.17	\$31.16
47-2000	Construction Trades Workers	19,749	19,524	(225)	(1%)	0.80	\$23.28
53-3000	Motor Vehicle Operators	18,236	19,002	766	4%	0.98	\$17.78
13-1000	Business Operations Specialists	15,141	18,781	3,640	24%	0.82	\$32.96
43-5000	Material Recording, Scheduling, Dispatching, & Distributing Workers	18,578	18,382	(196)	(1%)	1.05	\$17.15
43-6000	Secretaries & Administrative Assistants	21,029	18,350	(2,679)	(13%)	1.13	\$20.20
43-9000	Other Office & Administrative Support Workers	21,855	17,292	(4,563)	(21%)	0.94	\$16.58
37-2000	Building Cleaning & Pest Control Workers	17,256	16,747	(509)	(3%)	0.97	\$14.05
53-7000	Material Moving Workers	16,039	16,169	130	1%	0.76	\$15.78
43-3000	Financial Clerks	20,990	15,838	(5,152)	(25%)	1.20	\$18.22
29-2000	Health Technologists & Technicians	14,491	15,080	589	4%	1.13	\$21.92
15-1100	Computer Occupations	12,805	14,837	2,032	16%	0.79	\$36.55
49-9000	Other Installation, Maintenance, & Repair Occupations	13,451	14,225	774	6%	1.04	\$22.15
21-1000	Counselors, Social Workers, & Other Community & Social Service Specialists	11,185	12,390	1,205	11%	1.32	\$22.69
35-2000	Cooks & Food Preparation Workers	11,449	12,371	922	8%	0.90	\$13.35
51-9000	Other Production Occupations	11,925	11,641	(284)	(2%)	1.06	\$18.86
13-2000	Financial Specialists	10,620	11,121	501	5%	0.89	\$38.06
41-3000	Sales Representatives, Services	7,304	11,046	3,742	51%	0.99	\$29.79
31-1000	Nursing, Psychiatric, & Home Health Aides	14,383	10,945	(3,438)	(24%)	1.07	\$14.52
11-1000	Top Executives	9,736	10,926	1,190	12%	0.98	\$59.08

Source: EMSI

Chautauqua County, New York

Table 31: Top 25 Occupations by Employment, 3-Digit SOC, New York

Top 25 Occupations by Employment, 3-Digit SOC - New York							
SOC	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 Location Quotient	Avg. Hourly Earnings
41-2000	Retail Sales Workers	506,770	534,744	27,974	6%	0.95	\$13.89
35-3000	Food & Beverage Serving Workers	338,137	451,967	113,830	34%	0.92	\$14.43
39-9000	Other Personal Care & Service Workers	247,164	394,008	146,844	59%	1.32	\$14.72
29-1000	Health Diagnosing & Treating Practitioners	320,344	392,000	71,656	22%	1.09	\$53.44
43-4000	Information and Record Clerks	357,587	372,969	15,382	4%	0.98	\$19.18
13-1000	Business Operations Specialists	254,411	348,749	94,338	37%	0.99	\$40.27
47-2000	Construction Trades Workers	301,212	331,991	30,779	10%	0.88	\$29.06
43-6000	Secretaries & Administrative Assistants	356,465	316,030	(40,435)	(11%)	1.26	\$24.46
31-1000	Nursing, Psychiatric, & Home Health Aides	272,825	305,352	32,527	12%	1.95	\$14.47
37-2000	Building Cleaning & Pest Control Workers	286,200	300,898	14,698	5%	1.13	\$16.98
43-9000	Other Office & Administrative Support Workers	321,560	292,735	(28,825)	(9%)	1.04	\$17.63
25-2000	Preschool, Primary, Secondary, & Special Education School Teachers	302,093	291,398	(10,695)	(4%)	1.07	\$37.91
53-3000	Motor Vehicle Operators	236,152	282,453	46,301	20%	0.95	\$20.57
15-1100	Computer Occupations	210,015	274,179	64,164	31%	0.95	\$45.96
13-2000	Financial Specialists	238,292	271,674	33,382	14%	1.42	\$54.32
43-5000	Material Recording, Scheduling, Dispatching, & Distributing Workers	247,490	256,223	8,733	4%	0.96	\$18.73
41-3000	Sales Representatives, Services	165,927	226,150	60,223	36%	1.32	\$50.47
53-7000	Material Moving Workers	188,867	217,366	28,499	15%	0.67	\$17.35
43-3000	Financial Clerks	246,375	206,608	(39,767)	(16%)	1.02	\$21.19
49-9000	Other Installation, Maintenance, & Repair Occupations	176,623	200,949	24,326	14%	0.95	\$24.56
11-9000	Other Management Occupations	172,229	195,179	22,950	13%	0.78	\$49.99
21-1000	Counselors, Social Workers, & Other Community & Social Service Specialists	168,865	189,544	20,679	12%	1.32	\$25.99
11-1000	Top Executives	148,052	188,123	40,071	27%	1.09	\$75.44
29-2000	Health Technologists & Technicians	161,326	179,993	18,667	12%	0.88	\$25.73
35-2000	Cooks & Food Preparation Workers	149,751	176,719	26,968	18%	0.84	\$14.32

Source: EMSI

Chautauqua County, New York

Wages for six of Chautauqua County's top 25 occupations are higher than wages of the same occupations in Western New York. Specifically, wages for Other Production Occupations and Assemblers and Fabricators are higher in the County than in both the Region and the State (Refer to Table 32). This represents an opportunity for the County to attract people to the county who work in these occupations.

Table 32: Average Hourly Earnings by Geography of Top 25 Chautauqua County Occupations

Average Hourly Earnings by Geography of Top 25 Chautauqua County Occupations				
SOC	Description	Chautauqua County	Western NY	New York
35-3000	Food & Beverage Serving Workers	\$12.56	\$12.71	\$14.43
41-2000	Retail Sales Workers	\$12.89	\$13.09	\$13.89
39-9000	Other Personal Care & Service Workers	\$13.97	\$13.46	\$14.72
25-2000	Preschool, Primary, Secondary, & Special Education School Teachers	\$32.54	\$31.16	\$37.91
29-1000	Health Diagnosing & Treating Practitioners	\$41.36	\$46.58	\$53.44
51-4000	Metal Workers & Plastic Workers	\$19.87	\$20.93	\$20.80
53-3000	Motor Vehicle Operators	\$18.93	\$17.78	\$20.57
43-4000	Information & Record Clerks	\$15.40	\$17.20	\$19.18
37-2000	Building Cleaning & Pest Control Workers	\$13.48	\$14.05	\$16.98
47-2000	Construction Trades Workers	\$21.80	\$23.28	\$29.06
43-5000	Material Recording, Scheduling, Dispatching, & Distributing Workers	\$16.72	\$17.15	\$18.73
53-7000	Material Moving Workers	\$16.06	\$15.78	\$17.35
51-9000	Other Production Occupations	\$18.96	\$18.86	\$18.85
49-9000	Other Installation, Maintenance, & Repair Occupations	\$20.86	\$22.15	\$24.56
43-9000	Other Office & Administrative Support Workers	\$15.43	\$16.58	\$17.63
29-2000	Health Technologists & Technicians	\$19.06	\$21.92	\$25.73
43-6000	Secretaries and Administrative Assistants	\$18.43	\$20.20	\$24.46
51-2000	Assemblers & Fabricators	\$17.76	\$17.32	\$16.84
31-1000	Nursing, Psychiatric, & Home Health Aides	\$13.82	\$14.52	\$14.47
35-2000	Cooks and Food Preparation Workers	\$12.88	\$13.35	\$14.32
21-1000	Counselors, Social Workers, & Other Community & Social Service Specialists	\$22.08	\$22.69	\$25.99
11-9000	Other Management Occupations	\$36.74	\$41.85	\$49.99
43-3000	Financial Clerks	\$17.38	\$18.22	\$21.19
13-1000	Business Operations Specialists	\$30.84	\$32.96	\$40.27
11-1000	Top Executives	\$53.07	\$59.08	\$75.44

Source: EMSI

Chautauqua County, New York

TALENT ATTRACTION

EMSI recently published their Fourth Annual Talent Attraction Scorecard (November 2019). The data giant examined large counties (100,000+ population) and small counties (5,000-999,999) to determine which ones were succeeding in growing their workforce. Chautauqua County falls within the large county analysis due to their population size. Out of 600 large counties studied across the country, Chautauqua County ranks 512. This is a slight drop in rank, as the county ranked 497 in the last scorecard. This ranking is not an anomaly for Western New York, as Niagara County and Erie County ranked 514 and 553 respectively. However, Cattaraugus and Allegheny Counties, who are considered in the small county category, did make small positive gains in their rankings. The 2019 Scorecard found that small counties in the southern United States were frequently top ranked in terms of talent attraction, which can be attributed to several business readiness factors including infrastructure investment, investment in education, long-term planning for workforce development, and attracting remote workers with quality of life assets.

About 3.7% of Chautauqua County's workforce works remotely, which is slightly higher than the other counties in Western New York (Refer to Table 33). However, this proportion of the population is below the national average which is above 5%. Remote workers are often employed in high skill, tech-related jobs, and the trend continues to spread across industries. **While remote workers may not be employed by a company that is necessarily in the county itself, they still contribute to the local economy and are a potential skilled labor force to draw from. Infrastructure to support remote workers, namely broadband access, is critical to expanding this number and to remain competitive in a labor market that continues to trend towards more flexible work styles.**

Table 33: Remote Workers

Remote Workers	
County	Percent
Chautauqua County, NY	3.7%
Niagara County, NY	2.6%
Erie County, NY	2.8%
Cattaraugus County, NY	3.0%
Allegheny County, NY	2.8%

Source: EMSI

EMPLOYMENT CONCENTRATION

Location Quotients for all Chautauqua County general occupation categories demonstrate where the County has competitive advantages relative to other similarly sized geographies, based on national trends. Chautauqua County has notable concentrations in Production Occupations; Community and Social Service Occupations; Education, Training, and Library Occupations; and Farming, Fishing, and Forestry Occupations (Refer to Table 34).

Chautauqua County, New York

Table 34: Concentration of Employment, 2019, Chautauqua County

Concentration of Employment, 2019 - Chautauqua County		
SOC	Description	LQ
51-0000	Production Occupations	1.78
21-0000	Community & Social Service Occupations	1.39
25-0000	Education, Training, & Library Occupations	1.32
45-0000	Farming, Fishing, & Forestry Occupations	1.31
35-0000	Food Preparation & Serving Related Occupations	1.23
39-0000	Personal Care & Service Occupations	1.13
33-0000	Protective Service Occupations	1.12
37-0000	Building & Grounds Cleaning & Maintenance Occupations	1.11
31-0000	Healthcare Support Occupations	1.08
49-0000	Installation, Maintenance, & Repair Occupations	1.07
29-0000	Healthcare Practitioners & Technical Occupations	1.03
17-0000	Architecture & Engineering Occupations	1.00
43-0000	Office and Administrative Support Occupations	0.94
41-0000	Sales and Related Occupations	0.94
53-0000	Transportation and Material Moving Occupations	0.89
47-0000	Construction & Extraction Occupations	0.87
11-0000	Management Occupations	0.74
27-0000	Arts, Design, Entertainment, Sports, & Media Occupations	0.62
23-0000	Legal Occupations	0.56
19-0000	Life, Physical, & Social Science Occupations	0.53
13-0000	Business & Financial Operations Occupations	0.49
55-0000	Military-only occupations	0.31
15-0000	Computer & Mathematical Occupations	0.26

Source: EMSI

JOB GROWTH BY ESTABLISHMENT STAGE

Studying where jobs were gained and lost based on establishment size can help identify which types of businesses are thriving in an economy and where policy intervention may be needed to support other types of businesses. The following categories breakdown establishments by size:

- **Self-employed:** 1
- **Stage 1:** 2-9
- **Stage 2:** 10-99
- **Stage 3:** 100-499
- **Stage 4:** 500+

Looking at the distribution of jobs by business size in Chautauqua County between 2013 and 2018 (Refer to Table 35 and 37), Stage 2 companies accounted for the largest portion of jobs at 38%. The same is true for the MSA (Buffalo-Cheektowaga-Niagara Falls) and the state (39% and 34%) respectively (Refer to Table 35, 36 and 37).

Chautauqua County, New York

Stage 2 firms also represented the only positive job growth for Chautauqua County, adding approximately 100 jobs over the 5-year period. Stage 4 establishments represented the biggest losses for the County, with approximately 4,200 job losses resulting in a 22% decline in employment at Stage 4 establishments.

Within the MSA, Stage 2 establishments added the most jobs, with Stage 3 establishments losing jobs. Stage 3 establishments also lost jobs across the state, while Stage 1 establishments experienced the largest job gains.

Table 35: Jobs by Stage of Establishment, Chautauqua County

Jobs by Stage of Establishment, Chautauqua County					
Establishment Stage (No. of Employees)	2013	2018	2018% of Total	2013-2018 Change	2013-2018 % Change
Self Employed (1)	1,300	1,200	2%	(100)	-8%
Stage 1 (2-9)	15,600	14,700	20%	(900)	-6%
Stage 2 (10-99)	28,000	28,100	38%	100	0%
Stage 3 (100-499)	15,700	15,000	20%	(700)	-4%
Stage 4 (500+)	19,400	15,200	20%	(4,200)	-22%
ALL	80,000	74,200	100%	(5,800)	-7%

Source: YourEconomy.org

Table 36: Jobs by Stage of Establishment, Buffalo-Cheektowaga-Niagara Falls MSA

Jobs by Stage of Establishment, Buffalo-Cheektowaga-Niagara Falls Metro					
Establishment Stage (No. of Employees)	2013	2018	2018% of Total	2013-2018 Change	2013-2018 % Change
Self Employed (1)	6,800	6,900	1%	100	1%
Stage 1 (2-9)	113,300	119,000	19%	5,700	5%
Stage 2 (10-99)	229,900	245,400	39%	15,500	7%
Stage 3 (100-499)	142,400	140,100	22%	(2,300)	-2%
Stage 4 (500+)	118,600	122,500	19%	3,900	3%
ALL	611,000	633,900	100%	22,900	4%

Source: YourEconomy.org

Table 37: Jobs by Stage of Establishment, New York

Jobs by Stage of Establishment, New York					
Establishment Stage (No. of Employees)	2013	2018	2018% of Total	2013-2018 Change	2013-2018 % Change
Self Employed (1)	113,500	116,300	1%	2,800	2%
Stage 1 (2-9)	2,300,000	2,600,000	25%	300,000	13%
Stage 2 (10-99)	3,400,000	3,500,000	34%	100,000	3%
Stage 3 (100-499)	2,100,000	2,000,000	19%	(100,000)	-5%
Stage 4 (500+)	2,000,000	2,100,000	20%	100,000	5%
ALL	9,913,500	10,316,300	100%	402,800	4%

Source: YourEconomy.org

Chautauqua County, New York

ENTREPRENEURIAL ECOSYSTEMS

In addition to analyzing jobs by establishment size, venture capital investment can be used as a proxy for innovation in measuring the extent to which entrepreneurial ecosystems exist within a geography. Venture capital investments transform innovation into economic growth by providing funding to grow companies, and therefore grow the economy.

Between 2014 and 2019¹², 227 venture capital deals were completed in the Buffalo-Cheektowaga-Niagara Falls metro area. This represents over \$529 million investment in 104 regional companies over the last 5+ years (Refer to Table 38).

Table 38: Buffalo-Cheektowaga-Niagara Falls MSA Venture Capital Deals

Buffalo-Cheektowaga-Niagara Falls Metro Venture Capital Deals			
Year	Deals (#)	Companies (#)	Capital Invested (\$)
2014	40	34	\$ 62,700,000
2015	55	38	\$ 124,510,000
2016	47	37	\$ 51,290,000
2017	27	23	\$ 54,070,000
2018	24	21	\$ 186,350,000
2019 (through 10/2019)	34	24	\$ 50,540,000
All	227	104	\$ 529,460,000

Source: PitchBook

Of these capital deals, the majority have occurred in the Healthcare and Information Technology sectors. Over \$216 million was invested in Healthcare companies through 75 deals while over \$245.0 million was invested in Information Technology companies involving 74 deals. Other sectors in which capital deals occurred included Business Products and Services; Consumer Products; and Services, Energy, and Materials and Resources (refer to Table 39 below).

Table 39: Buffalo-Cheektowaga-Niagara Falls Metro Venture Capital Deals by Sector

Buffalo-Cheektowaga-Niagara Falls Metro Venture Capital Deals by Sector, 2014-Oct. 2019			
Sector	Deals (#)	Companies (#)	Capital Invested (\$)
Healthcare	75	36	\$ 216,120,000
Information Technology	74	35	\$ 245,420,000
Business Products and Services	44	16	\$ 36,600,000
Consumer Products and Services	24	12	\$ 30,290,000
Energy	8	3	\$ 820,000
Materials and Resources	2	2	\$ 210,000
Total	227	104	\$ 529,460,000

Source: PitchBook

¹² Data is through October 2019.

Chautauqua County, New York

TOP CHAUTAUQUA COUNTY EMPLOYERS

Table 40 outlines the employers with over 500 employees in Chautauqua County. Cummins Inc., The Resource Center, SUNY Fredonia, and UPMC Chautauqua all have more than 1,000 employees. Six of these 14 companies, (or 43%), are in the Health Care and Social Assistance sector (NAICS 62). Four of the companies, (or 29%), are in the Manufacturing Sector (NAICS 31-33).

Table 40: Chautauqua County Employers with Over 500 Employees

Chautauqua County Employers with Over 500 Employees			
Company Name	Primary NAICS	NAICS Description	Number of Employees
Cummins Inc	333618	Other Engine Equipment Manufacturing	1,000-4,999
The Resource Center	621210	Offices of Dentists	1,000-4,999
State University of NY at Fredonia	611310	Colleges, Universities & Professional Schools	1,000-4,999
UPMC Chautauqua	621340	Offices-Physical, Occupational/Speech Therapists/Audiologists	1,000-4,999
Bush Industries Inc.	337211	Wood Office Furniture Manufacturing	500-999
Chautauqua County Court House	921120	Legislative Bodies	500-999
Heritage Village Retirement Campus	623312	Assisted Living Facilities for the Elderly	500-999
Hultquist Place	623311	Continuing Care Retirement Communities	500-999
Lake Shore Health Care Center	622110	General Medical & Surgical Hospitals	500-999
Lutheran Social Services	624190	Other Individual & Family Services	500-999
Peek'n Peak Resort	721199	All Other Traveler Accommodation	500-999
SKF Aeroengine Service North America	332991	Ball & Roller Bearing Manufacturing	500-999
TLC Health Network	541611	Administrative & General Management Consulting Services	500-999
Truck-Lite Co. LLC	336320	Motor Vehicle Electrical & Electronic Equipment Manufacturing	500-999

Source: Reference USA

Chautauqua County, New York

TOURISM INDUSTRY

Based on the industries listed below in Table 41, the tourism industry comprises \$61.2 million of total county GRP (1.4%). The greatest number of jobs is contained within Hotels and Motels, followed by much smaller employment figures in Skiing Facilities and Marinas. Both Skiing Facilities and Marinas show high Location Quotients (4.4 and 4.2 respectively) with positive Competitive Effects, (meaning the industries gained more jobs than would be expected based on typical industry and national trends). Western New York's tourism jobs are concentrated in Hotels and Motels, Sports Teams, and Museums. In 2019, Chautauqua County comprised 10% of all tourism jobs in Western New York (Refer to Table 42).

A negative Competitive Effect in Chautauqua County (-214 jobs) indicates that the region lost more jobs than anticipated based on industry and national trends. Meanwhile, Western New York picked up almost 1,000 more jobs than anticipated based on economic conditions.

Table 41: Chautauqua County Tourism Industry

Top 10 Chautauqua County Tourism Industries, 2009-2019							
NAICS	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 Location Quotient	Competitive Effect
721110	Hotels (except Casino Hotels) & Motels	867	841	(26)	(3%)	1.6	(167)
713920	Skiing Facilities	34	58	24	71%	4.4	18
713930	Marinas	16	58	42	263%	4.2	38
712110	Museums	13	41	28	215%	1.3	24
721211	RV (Recreational Vehicle) Parks & Campgrounds	28	26	(2)	(7%)	2.5	(8)
713990	All Other Amusement & Recreation Industries	49	23	(26)	(53%)	0.3	(56)
712190	Nature Parks & Other Similar Institutions	14	22	8	57%	6.0	2
721214	Recreational and Vacation Camps (except Campgrounds)	35	20	(15)	(43%)	1.7	(25)
711211	Sports Teams & Clubs	15	19	4	27%	0.6	(1)
561591	Convention & Visitors Bureaus	13	18	5	38%	5.3	3
Total Tourism Jobs		1,174	1,186	12	1%		(214)

Source: EMSI

* other subsectors are included in this industry and are reflected in the tourism total jobs. However, these subsectors are not shown in this list as they demonstrate low employment figures.

Chautauqua County, New York

Table 42: Western New York Tourism Industry

Top 10 Western New York Tourism Industries, 2009-2019							
NAICS	Description	2009 Jobs	2019 Jobs	2009 - 2019 Change	% Change 2009 - 2019	2019 Location Quotient	Competitive Effect
721110	Hotels (except Casino Hotels) & Motels	5,104	6,610	1,506	30%	1.0	675
713990	All Other Amusement & Recreation Industries	582	1,038	456	78%	1.1	99
711211	Sports Teams & Clubs	670	997	327	49%	2.3	83
712110	Museums	310	461	151	49%	1.1	49
713290	Other Gambling Industries	232	317	85	37%	1.6	108
712130	Zoos & Botanical Gardens	202	304	102	50%	1.7	23
721211	RV (Recreational Vehicle) Parks & Campgrounds	132	219	87	66%	1.6	54
561510	Travel Agencies	257	215	(42)	(16%)	0.5	(58)
713920	Skiing Facilities	248	214	(34)	(14%)	1.3	(82)
713930	Marinas	110	191	81	74%	1.1	54
Total Tourism Jobs Western New York		8,950	11,842	2,892	32%		998
Chautauqua County Tourism Jobs as % of WNY		13%	10%				

Source: EMSI

Within the three more rural counties of Western New York (Chautauqua, Allegany and Cattaraugus), Chautauqua County generates the most visitor spending, (\$261 Million along with half of the local taxes associated with visitation (Refer to Table 43 and Figure 12). When visitors travel to the three counties of Allegany, Cattaraugus and Chautauqua County, the largest proportions of spending are on Food and Beverage (23%) and on Second Homes (23%). The next largest categories of spending are Lodging (20%) and Retail and Service Stations (15%).

Table 43: Tourism Impacts

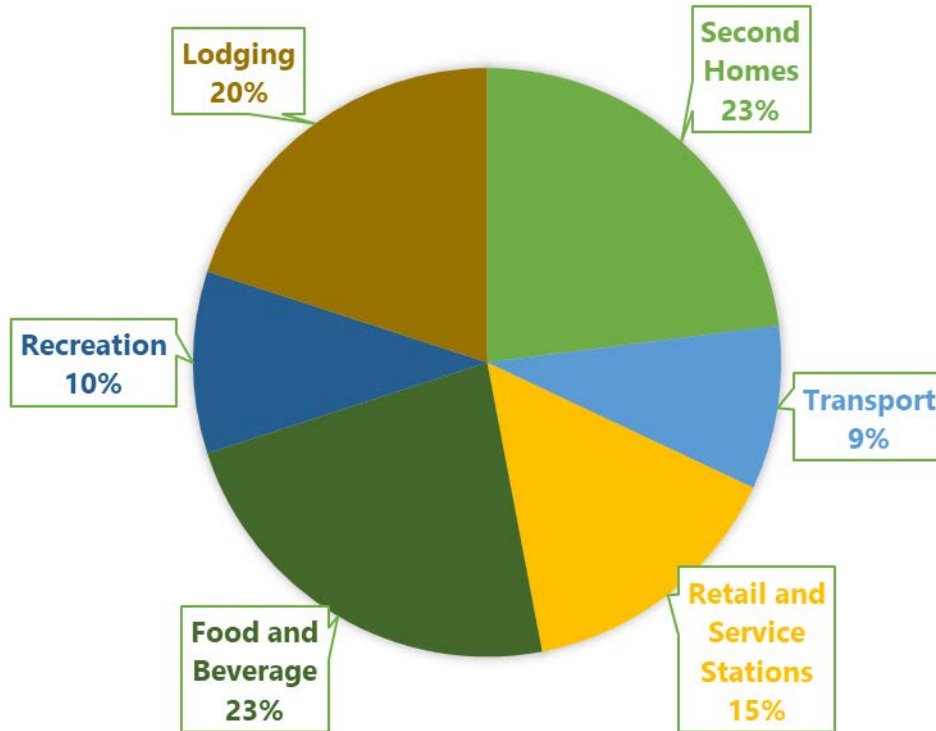
Tourism Impacts, 2017*			
County	Traveler Spending	Local Taxes	State Taxes
Allegany	\$ 68,813,000	\$ 4,608,000	\$ 3,784,000
Cattaraugus	\$222,513,000	\$14,936,000	\$12,237,000
Chautauqua	\$261,522,000	\$19,480,000	\$14,382,000
Total	\$552,847,000	\$39,024,000	\$30,403,000
Chautauqua as % of Total	47%	50%	47%

Oxford Tourism Economics, 2017

*2017 most recent data available

Figure 12: Traveler Spending

TRAVELER SPENDING - CHAUTAUQUA, ALLEGANY, CATTARAUGUS COUNTIES



REAL ESTATE TRENDS

PROFESSIONAL/OFFICE MARKET

The office market in the Western New York region has recently exhibited some strength, characterized by falling vacancy rates. According to CBRE's Q4 2018 Buffalo Office Marketview report, flex office space is in high demand amid a tight industrial market. Suburban office market activity is picking up with new construction being recently announced. The Buffalo office market's overall vacancy rate decreased to 12.5% in 2018, and is at its lowest rate since 2007.

To evaluate the potential for new office space in Chautauqua County specifically, we analyzed the future demand for office space in both Chautauqua County and the Western NY Region.

Table 44 shows projected employment for all 2-digit NAICS office-utilizing industries in the County. These industries are expected to add 103 jobs to Chautauqua County between 2019 and 2029 (a 1% growth rate).

Table 44: Employment Growth in Office-Utilizing Industries, Chautauqua County

Employment Growth in Office-Utilizing Industries, Chautauqua County					
NAICS	Description	2019 Jobs	2029 Jobs	2019-2029 Change	2019-2029 % Change
51	Information	491	306	(185)	(38%)
52	Financial and Insurance	874	817	(57)	(7%)
54	Professional, Scientific, and Technical Services	1,073	1,111	38	4%
55	Management of Companies and Enterprises	170	33	(137)	(81%)
56	Administrative and Support and Waste Management and Remediation Services	1,861	2,009	148	8%
81	Other Services (except Public Administration)	2,404	2,370	(34)	(1%)
90	Government	9,834	10,165	331	3%
	Total for Office-Utilizing Industries	16,707	16,810	103	1%

Source: EMSI

Chautauqua County, New York

The growth rate of such jobs is expected to be higher in the larger Western NY region, at 4% over the same time period (2019-2029) (Refer to Table 45).

Table 45: Employment Growth in Office-Utilizing Industries, Western NY

Employment Growth in Office-Utilizing Industries, Western NY					
NAICS	Description	2019 Jobs	2029 Jobs	2019-2029 Change	2019-2029 % Change
51	Information	8,293	8,289	(4)	(0%)
52	Financial and Insurance	32,439	35,971	3,532	11%
54	Professional, Scientific, and Technical Services	32,800	35,694	2,894	9%
55	Management of Companies and Enterprises	13,192	15,133	1,941	15%
56	Administrative and Support and Waste Management and Remediation Services	31,799	30,608	(1,191)	(4%)
81	Other Services (except Public Administration)	29,692	30,970	1,278	4%
90	Government	113,575	114,639	1,064	1%
	Total for Office-Utilizing Industries	261,790	271,304	9,514	4%

Source: EMSI

These employment projections indicate limited demand for office space in the county and region over the next decade. Under the conservative assumption that each new worker will require 175 rentable square feet (RSF) of office space¹³, new demand for office space will be just over 18,000 SF in the County and nearly 1.7 million SF in the region over the coming 10 years. While demand is minimal in the County, it is feasible that Chautauqua County could capture some of the demand from the surrounding region (Refer to Table 46).

Table 46: New Demand for Office Space

New Demand for Office Space		
	Chautauqua County	Western NY
Square Feet	18,025	1,664,950

Source: EMSI, U.S. General Services Administration

¹³ A 2010 report from the U.S. General Services Administration, "Workspace Utilization and Allocation Benchmark," found average rentable office space per employee to be 230 square feet. As a result of efforts to implement more efficient design standards, the typical office standard has declined from around 250 square feet per workstation in the early 2000s to around 190 square feet or less. In addition, a trend toward less personal workspace in favor of larger group space, as well as an increase in teleworking will likely contribute to continued declines in office space per employee.

Chautauqua County, New York

INDUSTRIAL MARKET

Industrial sectors represent over 21% of total jobs in Chautauqua County (Refer to Table 47). The Manufacturing, Transportation and Warehousing, and Wholesale Trade sectors accounted for more than 11,000 of the County's jobs in 2019- jobs which require the use of a variety of industrial spaces. Employment in these industries is expected to contract; however, shrink by 6% over the next 10 years.

Table 47: Employment Growth in Industrial Industries, Chautauqua County

Employment Growth in Industrial Industries, Chautauqua County					
NAICS	Description	2019 Jobs	2029 Jobs	2019 - 2029 Change	2019 - 2029 % Change
31	Manufacturing	8,913	8,239	(674)	(8%)
48	Transportation and Warehousing	1,113	1,178	65	6%
42	Wholesale Trade	1,112	1,107	(5)	(0%)
Total		11,138	10,524	(614)	(6%)

Source: EMSI

Within the Western New York Region, there are nearly 108,000 jobs in industrial space-utilizing industries (Refer to Table 48). Job losses are expected to occur in the region as well, albeit at a slower pace of 2%.

Table 48: Employment Growth in Industrial Industries, Western NY

Employment Growth in Industrial Industries, Western NY					
NAICS	Description	2019 Jobs	2029 Jobs	2019 - 2029 Change	2019 - 2029 % Change
31	Manufacturing	66,536	63,514	(3,022)	(5%)
48	Transportation and Warehousing	19,630	21,499	1,869	10%
42	Wholesale Trade	21,655	20,843	(812)	(4%)
Total		107,822	105,856	(1,966)	(2%)

Source: EMSI

Although projected employment points towards a weakening industrial market, recent real estate trends tell a different story. According to CBRE's Q4 2018 Buffalo Industrial MarketView report¹⁴, the region is experiencing record low industrial site/property availability. The region's industrial property availability rate of 3.4% in 2018 represented a decrease from the previous record low of 3.5% from in 2017. Much of this can be attributed to e-commerce sales putting pressure on retailers to shift goods from retail shelves to warehouse racks, which has increased industrial warehouse demand. As a result, industrial lease rates are rising as industrial inventory is

¹⁴ This report tracks warehouse, manufacturing and flex industrial buildings in Buffalo and the surrounding submarkets that are larger than 10,000 SF and built after 1950.

Chautauqua County, New York

scarce. 2018 marks the 14th consecutive year that the Buffalo market's industrial market availability rate has remained below the national average.¹⁵

According to the online property sales sites, Loopnet, there are approximately 12 industrial properties for sale or for lease in Chautauqua County (Refer to Table 49). Most of these properties are located in Dunkirk or Jamestown. However, there are many more sites available that are not listed. The challenge is convincing developers to invest in outdated facilities, when the cost of building new efficient facilities is cost competitive. A recent brownfield analysis revealed that there are approximately 400 properties in Chautauqua County that would qualify for state incentives.

Table 49: Chautauqua County Industrial Properties for Sale or Lease

Chautauqua County Industrial Properties for Sale or Lease			
Address	Status	Price	SF
323 Fluvanna Ave, Jamestown	For Lease	\$0.33-\$0.80/SF/month	8,000
Main & 4th St, Dunkirk	For Lease	\$0.42/SF/month	49,055
36 Railroad Ave, Frewsburg	For Sale	\$499,000	80,000
3213 Middle Rd, Dunkirk	For Sale	\$600,000	42,820
789 Deer St, Dunkirk	For Sale	\$250,000	11,464
1 Precision Way, Jamestown	For Sale	\$5,900,000	2,265,120
326 Fluvanna Ave, Jamestown	For Sale	\$298,900	8,715
1652 Warren Jamestown Blvd, Jamestown	For Sale	NA	16,560
5485 W. Lake Rd, Fredonia	For Sale	NA	19,076
219 Brigham Rd, Dunkirk	For Sale	\$450,000	26,000
201 Winchester Rd, Lakewood	For Sale	\$1,250,000	92,373
26 E Talcott St, Dunkirk	For Sale	NA	244,000
Total			2,863,183

Source: Loopnet

Warehousing Space

The transformative nature of retail, particularly the increasing prevalence of e-commerce, has redefined the public's expectations of how and where they can purchase everyday goods. As a result, retailers are exploring omnichannel ways of engaging consumers by balancing online purchases with in-store pick-ups, and by creating memorable and unique in-store experiences. The transformation of the retail industry has impacts well beyond Chautauqua's small business ecosystem. There are larger implications for transportation, warehousing, and logistics firms as producers and distributors look to gain proximity to their customer base and decrease shipment times.

RESIDENTIAL MARKET

¹⁵ CBRE

Chautauqua County, New York

Chautauqua County supports more than 66,900 housing units, a majority of which are owner occupied. 52% of units in the County and 57% in the Region are owner occupied, as of 2019. A higher percentage of units are vacant in the County (22%) than in the Region (12%). Since 2010, the percent of vacant units in Chautauqua County has increased from 19% to 22%. This is projected to increase to 25% by 2024 without sufficient oversight.

Table 50: Housing Stock Summary

Housing Stock Summary												
	Chautauqua County						Western NY					
	2010		2019		2024		2010		2019		2024	
	# Units	% of Total	# Units	% of Total	# Units	% of Total	# Units	% of Total	# Units	% of Total	# Units	% of Total
Occupied	54,244	81%	52,406	78%	50,573	75%	578,435	89%	583,445	88%	581,242	86%
Owner	36,876	55%	34,821	52%	33,566	50%	384,660	59%	380,847	57%	378,844	56%
Renter	17,368	26%	17,585	26%	17,007	25%	193,775	30%	202,598	30%	202,398	30%
Vacant	12,676	19%	14,514	22%	16,600	25%	74,830	11%	83,151	12%	91,062	14%
Total	66,920	100%	66,920	100%	67,173	100%	653,265	100%	666,596	100%	672,304	100%

Source: ESRI

The amount of housing stock in the County has not changed since 2010, a trend that is expected to continue through 2024 (Refer to Table 51). Numbers regarding Western NY housing stock reveals a small amount of growth since 2010 (2%). The number of vacant units in the county is expected to increase by 1,838 (14%) between now and 2024.

While a decreasing population might suggest that new housing stock is not warranted, rehabilitating or otherwise updating housing stock is critical to attracting the appropriate workforce for many of the county's top industries. However, based on interviews with key stakeholders know that there is pent up demand for quality housing stock, particularly from young professionals.

Table 51: Change in Number of Housing Units

Change in Number of Housing Units								
	Chautauqua County				Western NY			
	Historical Change (2010-2019)		Projected Change (2019-2024)		Historical Change (2010-2019)		Projected Change (2019-2024)	
	#	%	#	%	#	%	#	%
Occupied	(1,838)	-3%	(1,833)	-3%	5,010	1%	(2,203)	0%
Owner	(2,055)	-6%	(1,255)	-4%	(3,813)	-1%	(2,003)	-1%
Renter	217	1%	(578)	-3%	8,823	5%	(200)	0%
Vacant	1,838	14%	2,086	14%	8,321	11%	7,911	10%
Total	-	0%	253	0%	13,331	2%	5,708	1%

Source: ESRI

A vacant unit is not necessarily an abandoned property. Multiple classifications for vacant housing units exist – from seasonal homes, to units on the market, to units that are simply unoccupied (refer to Table 52). Most of the

Chautauqua County, New York

vacant units in the County (58%), are classified as such because they are used seasonally¹⁶ (Refer to Table 52) Seasonal homeowners can be an important part of the county's tourism economy, as they spend more money than the typical weekend tourist and often bring in other visitors who come and spend money. If the seasonal homes (8,348) are removed from the calculation to determine the number of total vacant units, vacancy rate for the county drops to about 9%.

Table 52: Vacant Units by Status, 2017

Vacant Units by Status, 2017				
	Chautauqua County		Western NY	
	# Units	% of Vacant Units	# Units	% of Vacant Units
For Rent	1,365	9%	13,023	16%
Rented- Not Occupied	374	3%	2,551	3%
For Sale Only	1,025	7%	7,191	9%
Sold- Not Occupied	123	1%	2,570	3%
Seasonal/Recreational/Occasional Use	8,348	58%	24,047	29%
For Migrant Workers	35	0%	108	0%
Other Vacant	3,169	22%	34,328	41%
Total	14,439	100%	83,818	100%

Source: ACS 2013-2017 5-Year Estimates

Of the existing housing stock, an overwhelming majority of units in the County and Region are single family homes. Multifamily housing options are limited in both geographies (Refer to Table 53).

¹⁶ "Other Vacant" refers to year-round units which were vacant for other reasons not mentioned. This can include foreclosure, personal reasons, legal proceedings, preparing to rent/sell, needs repairs, or extended absence, among others.

Chautauqua County, New York

Table 53: Housing Units by Units in Structure

Housing Units by Units in Structure				
	Chautauqua County		Western NY	
	# Units	% of Total	# Units	% of Total
1, detached	45,980	68%	411,466	62%
1, attached	1,134	2%	16,705	3%
2	7,383	11%	99,869	15%
3 or 4	4,063	6%	37,423	6%
5 to 9	1,404	2%	26,939	4%
10 to 19	1,100	2%	13,929	2%
20 to 49	1,010	1%	11,133	2%
50 or more	867	1%	20,036	3%
Mobile home	4,437	7%	23,298	4%
Boat, RV, van, etc.	44	0%	199	0%
Total	67,422	100%	660,997	100%

Source: Esri, ACS 2013-2017 5-Year Estimate

Chautauqua County's housing stock is aging. 42% of units were built in 1930 or earlier, with the median year that housing units were built being 1950 (refer to Table 54). This could be attributed to minimal units having been added to the housing stock for many years.

Table 54: Housing Units by Year Structure Built

Housing Units by Year Structure Built				
	Chautauqua County		Western NY	
	# Units	% of Total	# Units	% of Total
2014 or later	191	0%	2,942	0%
2010-2013	488	1%	7,290	1%
2000-2009	3,865	6%	35,697	5%
1990-1999	4,266	6%	48,114	7%
1980-1989	5,229	8%	45,366	7%
1970-1979	5,971	9%	67,966	10%
1960-1969	5,347	8%	68,162	10%
1950-1959	8,566	13%	107,858	16%
1940-1949	5,359	8%	57,305	9%
1939 or earlier	28,140	42%	220,297	33%
Median	1950		1955	
Total	67,422	100%	660,997	100%

Source: Esri, ACS 2013-2017 5-Year Estimate

Table 55: Chautauqua County Residential Building Permits

Chautauqua County, New York

According to the Department of Housing and Urban Development, 37 residential building permits have been issued in the County since 2014, and all permits have been for single family structures¹⁷ (Refer to Table 55).

Chautauqua County Residential Building Permits		
	Single-Family	Multi-Family
2014	7	0
2015	8	0
2016	7	0
2017	4	0
2018	8	0
2019	3	0
Total	37	0

Source: HUD

Home values are lower in Chautauqua County than in Western NY. Median home values in the County are approximately \$90,000, with 44% of owner-occupied housing units having a value between \$50,000 and \$99,999 (refer to adjacent Table 53). The median home value in Western New York is higher at nearly \$135,000, compared with Chautauqua County's median home value of just over \$90,000 (Refer to Table 56)

Table 56: Owner-Occupied Housing Units by Value, 2019

Owner-Occupied Housing Units by Value, 2019				
	Chautauqua County		Western NY	
	# Units	% of Total	# Units	% of Total
< \$50,000	5,137	15%	35,282	9%
\$50,000-\$99,999	15,181	44%	91,584	24%
\$100,000-\$149,999	5,639	16%	90,992	24%
\$150,000-\$199,999	3,818	11%	64,189	17%
\$200,000-\$249,999	1,903	5%	35,413	9%
\$250,000-\$299,999	1,186	3%	21,344	6%
\$300,000-\$399,999	1,024	3%	19,990	5%
\$400,000-\$499,999	296	1%	7,667	2%
\$500,000-\$749,999	347	1%	7,738	2%
\$750,000-\$999,999	127	0%	3,192	1%
\$1,000,000-\$1,499,999	120	0%	2,022	1%
\$1,500,000-\$1,999,999	25	0%	584	0%
\$2,000,000+	18	0%	825	0%
Median	\$90,424		\$134,918	
Total	34,821	100%	380,822	100%

Source: Esri

¹⁷ Note that this data is from a different source and will not equal the estimates from ACS.

Chautauqua County, New York

Median contract rent is also lower in the County than in the Region, at \$495/month and \$599/month respectively (Refer to Table 57). Median gross rent, which represents contract rent plus utilities, is \$631/month in the County and \$741/month in the Region.

Table 57: Median Rent

Median Rent		
	Chautauqua County	Western NY
Median Contract Rent	\$495	\$599
Median Gross Rent	\$631	\$741

Source: Esri, ACS 2013-2017 5-Year Estimate

SUMMARY OF OPPORTUNITIES, CHALLENGES AND RECOMMENDATIONS

- Updating housing stock is critical to attracting the appropriate workforce for many of the county's top industries.
- Seasonal homeowners can be an important part of the county's tourism economy, as they spend more money than the typical weekend tourist and often bring in other visitors who come and spend money.
- If the seasonal homes (8,348) are removed from the calculation to determine the number of total vacant units, vacancy rate for the county drops to about 9%.

Attachment A: Data Sources

PROPRIETARY DATA SOURCES

ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see www.economicmodeling.com). This is due to the fact that local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

ESRI BUSINESS ANALYST ONLINE (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. ESRI data are used by developers to maximize their portfolio, by retailers to understand growth opportunities, and by economic developers to attract business that fit in their community. For more information, visit www.esri.com.

PITCHBOOK

PitchBook is a leading provider of company and transaction data, including venture capital, private equity, and M&A transactions. As part of the Morningstar brand, PitchBook tracks every aspect of the public and private equity markets, and is trusted by financial investors and other professionals worldwide. For more information on PitchBook, please see <https://pitchbook.com/>.

YOURECONOMY (YE), BUSINESS DYNAMICS RESEARCH CONSORTIUM (BDRC)

YourEconomy (YE) aggregates longitudinal establishment-level data by state, metro, and county, enabling the user to track changes in a region's establishments, jobs, and sales over time. These variables can be cross-tabulated by business stage (e.g. Self-Employed; Stage One - 2 to 9 employees, Stage 2 – 10 to 99 employees, etc.) to show the region's economic makeup by business size and how these businesses have fared economically. Furthermore, it reveals a granular view of business activity in a particular region and shows how community compare to other communities. YE uses the Infogroup Historical Database as its underlying data. For more information, visit <http://youreconomy.org/>

PUBLIC DATA SOURCES

AMERICAN COMMUNITY SURVEY (ACS), U.S. CENSUS

The American Community Survey (ACS) is an ongoing statistical survey published by the U.S. Census Bureau that gathers demographic and socioeconomic information on age, sex; race; family and relationships; income and benefits; health insurance; education; veteran status; disabilities; commute patterns; and other topics. The survey is mandatory to fill out, but the survey is only sent to a small sample of the population on a rotating basis. The survey is crucial to major planning decisions, such as vital services and infrastructure investments made by municipalities and cities. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. For more information on the ACS, visit <http://www.census.gov/programs-surveys/acs/>

ONTHEMAP, U.S. CENSUS

OnTheMap is a tool developed through the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data regarding where workers are employed and where they live. also offer visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. The OnTheMap tool can be found at the website provided, along with links to documentation: <http://onthemap.ces.census.gov/>.



Chautauqua County Economic Development Strategy

Saratoga Springs, NY
Richmond, VA
Portland, ME
Boston, MA
Brattleboro, VT



Chautauqua County, New York

APPENDIX C: INDUSTRY RESEARCH

INDUSTRY OVERVIEWS

Vehicle Manufacturing and Technology

TRENDS

Vehicle manufacturing related industries meet the criteria for success in Western New York. In recent years these industries have been characterized by a high level of technological change, which is related to robotics/automation/AI. Though the prospects for growth in these industries are muted, opportunity exists to capitalize on the technological side of the processes.

Some notable trends include:

- ◆ Consumers are becoming increasingly environmentally conscious; vehicle manufacturers are focusing operations on the production of hybrid and compact cars and more fuel-efficient vehicles.
- ◆ A high level of technological change in the last few years has impacted the manufacturing process. Modern vehicle design processes make heavy use of computer assisted design software. There is a high level of automation in assembly plants with a lot of labor being performed by robotic arms.
- ◆ The growing level of electronic content in new vehicles is helping to boost electronics manufacturers. Fewer cars are being produced, but there is increased electrical component use. It is expected that the technology needed to develop and install these parts will become more complex.

INFRASTRUCTURE

This industry is capital-intensive and requires sophisticated manufacturing facilities and robust supply chains. Production facilities use specialized equipment and substantial floor space.

WORKFORCE

Existing vehicle manufacturing related industries in Western NY have a variety of jobs that do not require advanced formal education or experience. Much of the skills required for these jobs are gained through on-the-job training.

As the industry advances, an increased focus on innovation and production efficiency is expected to lead to a reduced need for labor. Technological advances will increase the need for a more highly skilled workforce, particularly as electronics become increasingly integrated into vehicles.

- ◆ Business recruitment: Top target region is Detroit-Warren-Dearborn, MI; others include New York-Newark-Jersey City, Grand Rapids-Kentwood, MI; Cleveland-Elyria, OH

NAICS 336211: Motor Vehicle Body Manufacturing

- ◆ Top Western NY Occupations:
 - ◆ *Assemblers and Fabricators: HS diploma, no experience required, moderate term on the job training*
 - ◆ *Welders, Cutters, Solderers, and Brazers: HS diploma, no experience required, moderate term on the job training*
 - ◆ *First-Line Supervisors of Production and Operating Workers: HS diploma, less than 5-years of experience required, no on the job training*

Chautauqua County, New York

- ◆ Painters, Transportation Equipment: HS diploma, no experience required, moderate term on the job training
- ◆ Sales Representatives, Wholesale and Manufacturing: HS diploma, no experience required, moderate term on the job training

NAICS 336370: Motor Vehicle Metal Stamping

- ◆ A supply chain requirement for Motor Vehicle Body Manufacturing
- ◆ Top Western NY Occupations:
 - ◆ Assemblers and Fabricators: HS diploma, no experience required, moderate term on the job training
 - ◆ Engine and Other Machine Assemblers: HS diploma, no experience required, moderate term on the job training
 - ◆ Machinists: HS diploma, no experience required, long-term on the job training
 - ◆ First-Line Supervisors of Production and Operating Workers: HS diploma, less than 5-years of experience required, no on the job training
 - ◆ Laborers and Freight, Stock, and Material Movers: no formal education, no experience required, short term on the job training

NAICS 336320: Motor Vehicle Electrical and Electronic Equipment Manufacturing

- ◆ Top Western NY Occupations:
 - ◆ Assemblers and Fabricators: HS diploma, no experience required, moderate term on the job training
 - ◆ First-Line Supervisors of Production and Operating Workers: HS diploma, less than 5-years of experience required, no on the job training
 - ◆ Inspectors, Testers, Sorters, Samplers, and Weighers: HS diploma, no experience required, moderate term on the job training
 - ◆ Industrial Engineers: Bachelor's degree, no experience required, no on the job training
 - ◆ Laborers and Freight, Stock, and Material Movers: no formal education, no experience required, short term on the job training

NAICS 326211: Tire Manufacturing

- ◆ Top Western NY Occupations:
 - ◆ Tire Builders: HS diploma, no experience required, moderate term on the job training
 - ◆ Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders: HS diploma, no experience required, moderate term on the job training
 - ◆ Assemblers and Fabricators: HS diploma, no experience required, moderate term on the job training
 - ◆ Inspectors, Testers, Sorters, Samplers, and Weighers: HS diploma, no experience required, moderate term on the job training
 - ◆ First-Line Supervisors of Production and Operating Workers: HS diploma, less than 5-years of experience required, no on the job training

Chautauqua County, New York

Agribusiness**TRENDS**

The agribusiness industry is undergoing a period of considerable change across numerous fronts. From changing consumer food preferences and related shifts toward “clean label” products, to sustained low commodity prices for farmers, to the recent surge in AgTech development, this industry is in the process of shaping how food is grown, raised, and produced for years to come.

Agribusiness related industries that have been identified for success in Western NY include Cheese Manufacturing and Fluid Milk Manufacturing (together, Dairy), Biological Product Manufacturing, and Confectionary Merchant Wholesalers.

- ◆ The dairy manufacturing industries, which supply a variety of goods to downstream markets (wholesalers, retailers, food service establishments) is largely dependent on the price of milk (which has declined substantially recently) and consumer demand.
- ◆ Larger dairy cooperatives and producers will continue to merger over the next 5-years. These newly merged producers will invest in technology to improve efficiencies so operators can offer products at lower prices to remain competitive.
- ◆ New market entrants into dairy production industries will hope to operate within niche segments of the industry, satisfying the growing demand for low-fat dairy alternatives and value-added products.
- ◆ Fermentation ties in nicely with dairy production. Fermented foods are derived by an anaerobic process which involves the application of natural bacteria that feeds on starch and sugar present in the food to produce lactic acid. This helps preserve the food and extend the shelf life. The market is driven by consumers’ rising health consciousness as consumption of fermented foods helps in improving the digestive system by maintaining a proper balance of bacteria. In terms of dairy products, this can include yogurt, chees, and Kefir milk. There is also a market for fermented vegetables, confectionary, bakery, and beverages.
- ◆ Key players in the global fermented foods market include CSK Food Enrichment, Cargill Incorporated, DSM, ConAgra Foods, and TetraPak.
- ◆ Empire State Brands, a startup company looking to establish a full-integrated hops and barley growing and processing operation began conversations with Chautauqua County in 2019.

Other industries to explore:

- ◆ **Hydroponics and aquaponics** are an integrated, soilless system for raising fish and plants. This is a small but rapidly growing industry that is experiencing exponential growth. Growth is being driven by food security and quality, community demand for locally grown food, and limited fresh water and land. Aquaponics and hydroponics systems help enhance productivity with minimum inputs.

INFRASTRUCTURE

- ◆ Dairy producers require a guaranteed supply of inputs (milk inputs) and specialized equipment and facilities (technology improves production and quality).
- ◆ The productivity from both aquaponics and hydroponics farming can be achieved in approximately 10% of the land area and 5% of the water volume required for crop production. These do not require fertile land and require less space, with 30% of the amount of water as compared to conventional farming. Various equipment needs include grow lights, HVAC, irrigation systems, water heaters, and aeration systems,

Chautauqua County, New York

WORKFORCE

- ◆ The overall agribusiness industry is characterized by stable employment. Efficiency gains and automation have not largely impacted workforce growth.
- ◆ Even with the technological changes, the dairy producing industry remains labor intensive. Wages are projected to continue to increase.
- ◆ Aquaponics requires a workforce that is knowledgeable about the industry. An example of a public-private partnership that works to address this is the University of Wisconsin-Stevens Point and Nelson and Pade, Inc. partnership. This partnership works to educate the workforce by offering an aquaponics course, an aquaponic certificate program, and 3-day aquaponic master class. New jobs in innovative, sustainable food production are created.
- ◆ Business Recruitment: Top region is Durham-Chapel Hill, NC; others include: Birmingham-Hoover, AL; Sheboygan, WI; Omaha-Council Bluffs, NE-IA; Sulphur Springs, TX; and **Buffalo-Cheektowaga, NY**

INCENTIVES

- ◆ Overall, the ability to take advantage of government subsidies and grants is a key success factor for agribusiness companies.
- ◆ Empire State Development is focusing on agribusiness across the state, including the Grow-NY food and agriculture competition which will offer a total of \$3 million in funding for each round to innovative high-growth start-ups that are focused on the food and agriculture industry.
- ◆ National Grid has an agri-business program which offers incentives and grants to agribusinesses.
- ◆ There are also a number of tax credits available including the farm workforce retention credit, real property credit for qualified NY manufacturers, farmers' school tax credit, investment tax credit, employment incentive credit, fuel tax refund, and research and experimentation tax credit.

Chautauqua County, New York

Utilities & Energy**TRENDS**

- ◆ The utilities industry's technology is focused on improving efficiency rather than overhauling of services.
- ◆ The biggest barriers to entry are regulations. This is true across all utility industries.

Gasoline & Petroleum Wholesaling

- ◆ Operators purchase petroleum products directly from bulk stations and sell to retailers including gas stations, car parts retailers, warehouses, supermarkets, manufacturers and natural gas retail distributors
- ◆ Key success factors:
 - ◆ *Ability to pass on cost increases to ensure profitability*
 - ◆ *Guaranteed supply of key inputs from alternative sources*
 - ◆ *Compliance with government regulations*
 - ◆ *Access to required utility infrastructure (be connected to the necessary pipelines from bulk terminals to ensure raw material supply)*
 - ◆ *Supply contracts in place for key inputs*
 - ◆ *Having contacts in key markets*

Clean Energy

- ◆ Natural gas and renewable energy continue to replace coal.
- ◆ Wind and solar dominate renewable growth. Wind and solar capacity has more than quadrupled in the last 10-years.
- ◆ In 2020, it is expected that renewable energy resources will continue to compete with traditional energy resources, as renewables compete to replace retiring coal capacity and aging gas and nuclear plants.
- ◆ There will also be a focus on boosting grid resiliency to better handle severe weather events. Renewables, storage, and microgrids and help prevent outages.

INFRASTRUCTURE

- ◆ Most utility industry require heavy investment in various capital such as generation plants, solar panels, wind turbines, transmission lines, gas pipelines, or water infrastructure.
- ◆ The Gas & Petroleum Wholesaling industry is highly capital intensive. New entrants must construct the necessary storage and transportation facilities to distribute gasoline and petroleum products. Tankers and other vehicle must also be purchased, contributing to start-up costs.

WORKFORCE

- ◆ Industry relies heavily on employees to provide management of utility services
- ◆ Wages have trended upward slightly; majority of sector employees work in high-skill positions that are in demand Advances in automation have enabled industry operators to maintain the minimal labor needed to maintain facilities
- ◆ Business Recruitment: Top region is Chicago-Naperville-Elgin, IL-IN-WI; others include: Tulsa, OK; Miami-Fort Lauderdale-Pompano Beach, FL; New York-Newark-Jersey City

Chautauqua County, New York

INCENTIVES

- ◆ In 2020, eligibility for the Production Tax Credit (PTC) for new wind build expires and the solar Investment Tax Credit (ITC) stepdown starts. Both of these have been key drivers for wind and solar growth in the US market. There are potential changes to come with respect to these credits.

Life Sciences**TRENDS**

Healthcare is often passed over by communities during economic development strategic planning processes because it is deemed to difficult to regulate at the local level and is traditionally seen as a non-traded sector. In other words, it does not contribute to creating and exporting goods outside of the region. While healthcare may not be a traded sector, there are numerous instances of healthcare facilities that attract customers to a specific region, as well as businesses that relocate in close proximity to healthcare facilities in order to improve their services.

Healthcare entities also act as important nodes in the web of cluster development. More and more the lines are blurred between where healthcare ends and the next industry begins. The interconnectedness of healthcare to Life Sciences and Medical Device Manufacturing means that communities with strong healthcare networks also have the potential to retain, attract, and cultivate business development among sectors that may not typically be associated with healthcare. In this industry cross-over, there are unique economic development opportunities including workforce development, entrepreneurship, community health and wellness, and business development.

Life sciences is an expansive industry that generally refers to the application of biology and technology to improve health care. This industry has flourished over the last decade, as the combination of growing consumer markets and technology uptake has amplified the growth of life science firms. As technologies are more frequently used in the application of healthcare and pharmaceutical development, skills related to technology are just as important as training in the medical field. JLL reports that workforce among the Life Sciences cluster remains competitive, as the direction of R&D in the Life Sciences field turns to more and more technology-based innovations. On a list of the top ten companies investing in R&D, five of ten are biopharmaceutical companies. Biopharmaceutical companies such as Roche, Merck, Novartis, Johnson & Johnson, and Pfizer fall among Amazon, Microsoft and Apple in terms of R&D investment.

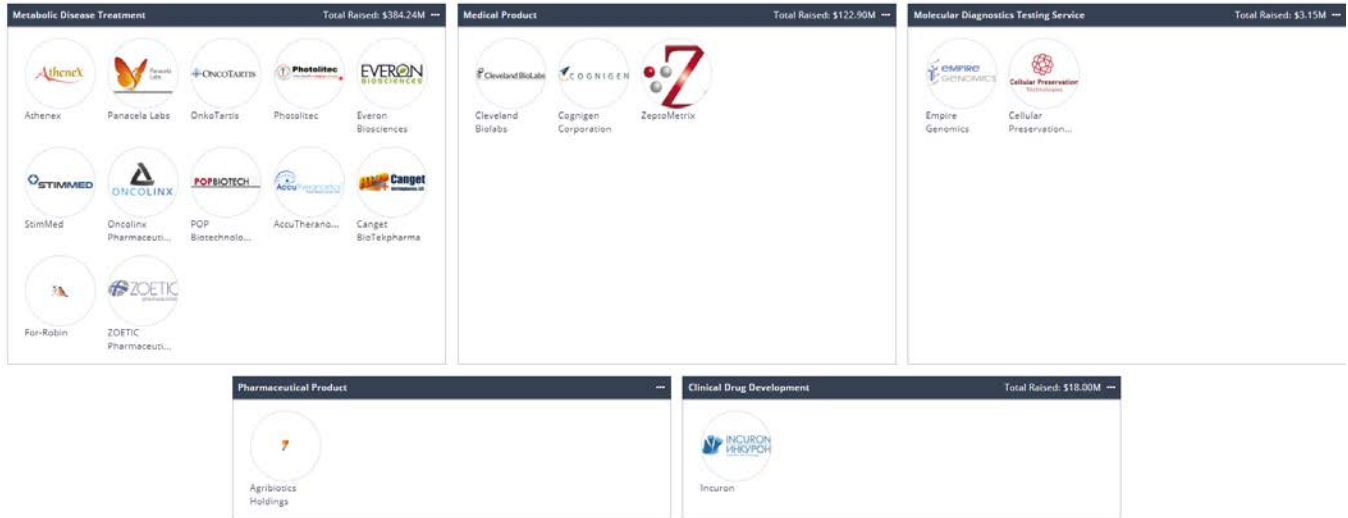
- ◆ Chautauqua's life science industry is very minimal – only 178 jobs currently
- ◆ Within the Western NY region, the industry has a stronger presence (10,649 jobs). This is being driven by:
 - ◆ *Research and Development in the Physical, Engineering and Life Sciences (3,930 jobs)*
 - ◆ *Pharmaceutical Preparation Manufacturing (1,227 jobs)*
 - ◆ *Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (929 jobs)*
- ◆ New technologies are becoming increasingly important. Nanotechnology (the production of machines and devices at the molecular level) will likely be one of the most important sectors of research over the next 10 years. Medical diagnostic imaging R&D is another growing field for the industry. This deals with the development and introduction of equipment for speedy, cost effective and noninvasive medical diagnoses and treatments. Also emerging is the development of materials that can survive hostile environments.

Chautauqua County, New York

- ◆ Though a life science cluster does not currently exist in Chautauqua County, the expansion of Athenex to Dunkirk represents an opportunity for the County to attract and build a life sciences cluster. Within the City of Buffalo, where Athenex has its current location, a life science culture has emerged, with a cluster of relevant companies congregating in the City and capitalizing on SUNY Buffalo’s education pipeline. Data from Pitchbook highlights the presence of this cluster in the City:

#	<input type="checkbox"/>	Company Name	<input type="checkbox"/>	Employees	Primary Industry Code	Verticals
1	<input type="checkbox"/>	Athenex (NAS: ATNX)	×	582	Biotechnology	Life Sciences, Oncology
2	<input type="checkbox"/>	Marion Surgical	×	7	Other Software	HealthTech, TMT, Virtual Reality
3	<input type="checkbox"/>	Qidni Labs	×		Therapeutic Devices	HealthTech, Life Sciences, TMT
4	<input type="checkbox"/>	Efferent Labs	×	3	Other Healthcare Technology S...	Life Sciences, Oncology, TMT
5	<input type="checkbox"/>	SomaDetect	×	26	Electronic Equipment and Instr...	AgTech, HealthTech, TMT
6	<input type="checkbox"/>	AccuTheragnostics	×	3	Biotechnology	Life Sciences, Oncology
7	<input type="checkbox"/>	Breast Care of Western New York	×		Hospitals/Inpatient Services	Life Sciences, Oncology
8	<input type="checkbox"/>	Canget BioTekpharma	×	8	Biotechnology	Life Sciences, Oncology
9	<input type="checkbox"/>	Cellular Preservation Technologies	×		Biotechnology	Life Sciences
10	<input type="checkbox"/>	Everon Biosciences	×	15	Drug Discovery	Life Sciences
11	<input type="checkbox"/>	For-Robin	×	1	Drug Discovery	Life Sciences, Oncology
12	<input type="checkbox"/>	Incuron	×		Biotechnology	Life Sciences, Oncology
13	<input type="checkbox"/>	Medical Acoustics	×	4	Diagnostic Equipment	Life Sciences
14	<input type="checkbox"/>	OmniSeq	×	50	Diagnostic Equipment	HealthTech, Life Sciences, Onc...
15	<input type="checkbox"/>	OnkoTartis	×		Drug Discovery	Life Sciences, Oncology
16	<input type="checkbox"/>	Panacela Labs	×	8	Biotechnology	Life Sciences, Oncology
17	<input type="checkbox"/>	Photolitec	×	11	Diagnostic Equipment	HealthTech, Life Sciences, Onc...
18	<input type="checkbox"/>	StimMed	×		Drug Discovery	Life Sciences
19	<input type="checkbox"/>	USA Occupational Services	×		Human Capital Services	Life Sciences
20	<input type="checkbox"/>	ZOETIC Pharmaceuticals	×	2	Biotechnology	Life Sciences, TMT
21	<input type="checkbox"/>	Empire Genomics	×		Drug Discovery	Life Sciences
22	<input type="checkbox"/>	Oncolinx Pharmaceuticals	×	2	Drug Discovery	Life Sciences, Oncology
23	<input type="checkbox"/>	POP Biotechnologies	×		Biotechnology	Life Sciences, Nanotechnology,...
24	<input type="checkbox"/>	Western New York Urology Associates	×	380	Clinics/Outpatient Services	Life Sciences, Oncology
25	<input type="checkbox"/>	ZeptoMetrix	×	54	Biotechnology	Life Sciences
26	<input type="checkbox"/>	Cleveland Biolabs (NAS: CBLI)	×	16	Biotechnology	Life Sciences, Oncology
27	<input type="checkbox"/>	Roswell Park Cancer Institute	×	2,098	Hospitals/Inpatient Services	Life Sciences, Oncology
28	<input type="checkbox"/>	Cognigen Corporation	×	40	Other Pharmaceuticals and Biot...	Life Sciences
29	<input type="checkbox"/>	Agribiotics Holdings	×		Other Agriculture	Life Sciences, Manufacturing
30	<input type="checkbox"/>	Soniwala Hematology Oncology Associates	×		Clinics/Outpatient Services	Life Sciences, Oncology
31	<input type="checkbox"/>	The Exigence Group	×	201	Practice Management (Healthca...	HealthTech, TMT

Chautauqua County, New York



INFRASTRUCTURE

- ◆ Research facilities are often filled with state of the art equipment, which requires capital to get started. Once operations begin however, labor costs are the dominant expense.

WORKFORCE

- ◆ The top occupations in Western NY are:
 - ◆ *Medical Scientists, Except Epidemiologists – doctoral or professional degree*
 - ◆ *Packaging and Filling Machine Operators and Tenders – HS diploma*
 - ◆ *General and Operations Managers – Bachelor’s degree*
 - ◆ *Assemblers and Fabricators – HS diploma*
 - ◆ *Inspectors, Testers, Sorters, Samplers, and Weighers – HS diploma*
 - ◆ *Clinical Laboratory Technologists and Technicians – Bachelor’s degree*

- ◆ Business Recruitment: Top region is Los Angeles-Long Beach-Anaheim, CA; others include: San Francisco-Oakland-Berkeley, CA; Chicago-Naperville-Elgin, IL-IN-WI; Riverside-San Bernardino-Ontario, CA; and San Diego-Chula Vista-Carlsbad, CA

