



4. PROFILE OF THE REGION

4.1 Introduction

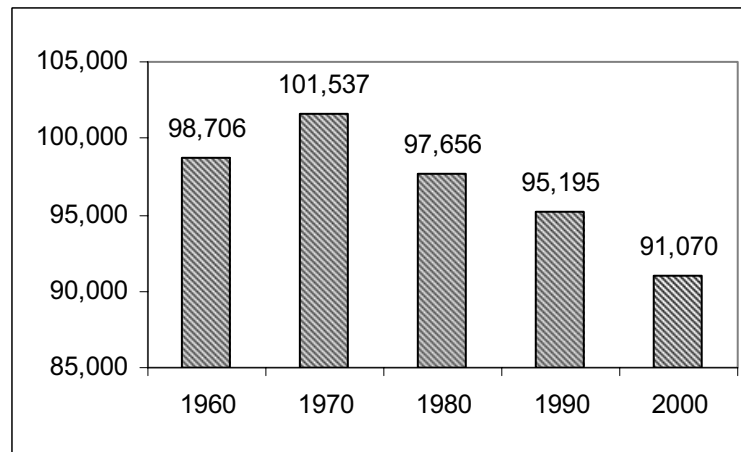
Social, demographic and economic trends directly influence transportation planning. Without a clear understanding of the region's current characteristics and expected future trends, it is impossible to properly plan a transportation system that meets the region's specific needs. This chapter presents current demographic, socioeconomic, and business trends in Chemung County, based on the 2000 U.S. Census. County travel behavior is also examined. Finally, the chapter concludes with a discussion of future demographic projections and a regional economic forecast.

4.2 Current

4.2.1 DEMOGRAPHICS

According to 2000 U.S. Census data, the population of Chemung County was 91,070 people. While New York State increased in population by 5.5% from 1990 to 2000, Chemung County experienced a population decline of 4.3%. This is part of a continuing trend in population decline for the county. As shown in Exhibit 4.1, U.S. Census data from 1960 to 2000, indicates that the population of Chemung County peaked in 1970 at 101,537 people and has steadily declined since.

Exhibit 4.1: Total Population, Chemung County, 1960-2000



Source: 1960-2000 U.S. Census



Chemung County is a fairly rural region with most of the population concentrated in the county's main regional centers. Approximately 91% of the county's

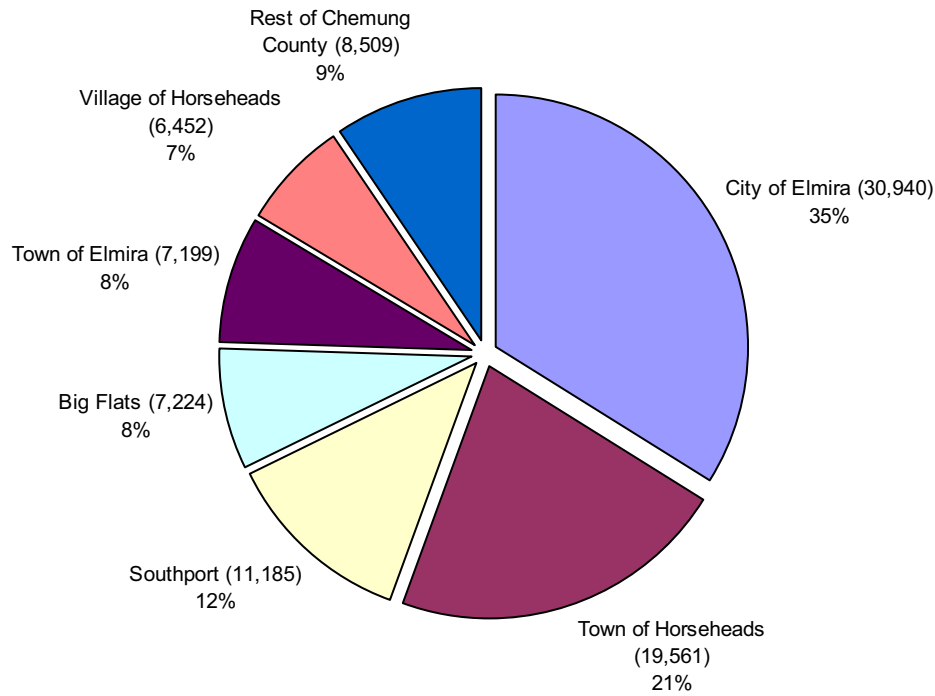
residents live in the top six population centers, as shown in Exhibits 4.2 and 4.3. This data is also illustrated in the map of population density (Exhibit 4.4).

Exhibit 4.2: Chemung County Population Centers, 2000

Town/City	Population	%
City of Elmira	30,940	34.0%
Town of Horseheads	19,561	21.5%
Southport	11,185	12.3%
Big Flats	7,224	7.9%
Town of Elmira	7,199	8%
Village of Horseheads	6,452	7.1%
Rest of Chemung County	8,509	9.3%
Total	91,070	100%

Source: 2000 U.S. Census

Exhibit 4.3: Chemung County Population Centers, 2000



Source: 2000 U.S. Census



Exhibit 4.4: Population Density by Census Blocks (GIS)



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Though the vast majority of the county's residents reside in the major cities/towns, these are also the areas experiencing the sharpest decline in population. As seen in Exhibit 4.5, several of the larger population centers, such as the City of Elmira, Big Flats, and the Village of

Horseheads, are declining at a faster rate than the county overall. Meanwhile, several smaller municipalities, such as the Town of Chemung and the Village of Van Etten are actually experiencing population growth.

Exhibit 4.5: Percent Change in Population, Municipalities in Chemung County, 1990-2000

	1990	2000	Percent Change
Ashland	1,966	1,951	-0.77%
Baldwin	829	853	2.81%
Big Flats	7,596	7,224	-5.15%
Catlin	2,626	2,649	0.87%
Chemung	2,540	2,665	4.69%
City of Elmira	33,724	30,940	-9.00%
Town of Elmira	7,440	7,199	-3.35%
Erin	2,002	2,054	2.53%
Town of Horseheads	19,926	19,561	-1.87%
Southport	11,571	11,185	-3.45%
Town of Van Etten	1,507	1,518	0.72%
Veteran	3,468	3,271	-6.02%
Village of Elmira Heights	4,359	4,170	-4.53%
Village of Horseheads	6,802	6,452	-5.42%
Village of Millport	342	297	-15.15%
Village of Van Etten	552	581	4.99%
Village of Wellsburg	617	631	2.22%
Chemung County	95,195	91,070	-4.53%

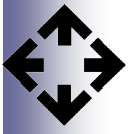
Source: 1990 and 2000 U.S. Census

According to the 2000 U.S. Census, 82,840 out of 91,070 people living in Chemung County, or approximately 91%, are white. The GIS minority population density map indicates that concentrations of minority population are found primarily in the City of Elmira and in a few outlying areas (Exhibit 4.6).

In 2000, there were 11,063 individuals, approximately 12% of the county's population, living at or below the poverty

level¹. Exhibits 4.7 and 4.8 illustrate the location of the highest densities of low and moderate income populations by census tract. For these maps, moderate income was defined as being 50-80% of the median county income and low income was defined as being 30-50% of the median county income. The 2000 U.S. Census reported Chemung County's median household income to be \$36,415.

¹ The census defines the poverty level through a set of money income thresholds that vary by family size and composition. If the total income for a family or individual falls below the relevant poverty threshold, then the family or individual is classified as being "below the poverty level."



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Exhibit 4.6: Minority Population by Census Blocks (GIS)



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Exhibit 4.7: Moderate Income Population by Census Block Groups (GIS)



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Exhibit 4.8: Low-Income Population by Census Block Groups (GIS)



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Chemung County has significant elderly and youth populations. The 2000 U.S. Census reported that 14,222 people, or 15.6% of the county's population, was 65 or older. The average age of the population of Chemung County is 37.9, higher than the New York State average age of 35.9. The 2000 U.S. Census also reported that 24,739 people, or 27.2% of the county's population, were 19 years or younger.

Chemung County has lower per capita personal income than the balance of New York State, as shown in Exhibit 4.9. The percentage difference in personal income in Chemung County as compared to the balance of New York State continues to increase. For example, in 1997 the per capita income in Chemung County was 73% of the statewide average, while in 2000, the per capita income had declined to 72.2%.

Exhibit 4.9: Per Capita Income, New York State and Chemung County, 1997-2000

	1997	1998	1999	2000
New York State	\$29,670	\$31,478	\$32,585	\$34,689
Chemung County	\$21,658	\$22,711	\$23,499	\$25,069

Source: U.S. Department of Commerce Bureau of Economic Analysis

4.2.2 BUSINESS & ECONOMICS

Chemung County's economy is fuelled by a broad spectrum of diversified businesses rather than a single, dominant industry. The County's location along the I-86 corridor and between a series of north-south interstate highways, providing direct access to all major markets in the Northeast, likely contributes to the variety of businesses. Additionally, Chemung County also has a strong labor force and is located in close proximity to numerous universities, such as Cornell University, Alfred University and the University of New York at Binghamton.

As can be seen from the listing of Chemung County businesses in Exhibit 4.10, businesses include such diverse industries as

glass manufacturing, optical fiber and cable products for telecommunications, ceramic substitutes for the auto industry, helicopters, surveillance aircraft, cable connectors for consumer and industrial use, televisions and computer monitors, fire hydrants and valves for hydrants, motion control products, oil filtration and reclaiming equipment, and imaging and sensing devices for nuclear and electro-optics markets. Exhibit 4.10 also presents the county's largest employers with their respective number of employees.

Exhibit 4.11 shows the various business sectors located in Chemung County, with Services, Wholesale and Retail trade, and Finance, Insurance and Real Estate (FIRE) representing the largest portion of private sector businesses in the region.

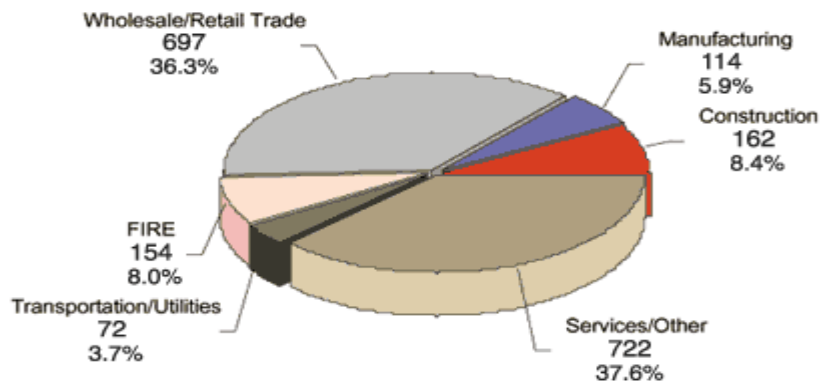


Exhibit 4.10: Major Chemung County Employers and Company Size

Employer	Employees
Anchor Glass Container	350-400
Arnot-Ogden Medical Center	1,000-1,499
Chemung Canal Trust Company	300-400
Corning Inc.	500-550
Cutler-Hammer	250-300
Dalrymple Gravel & Contracting	250-499
Elcor Health Services	250-499
Elmira College	250-499
F. M. Howell & Company	250-400
Hardinge Inc.	500-750
Hilliard Corporation	250-400
IST (Imaging & Sensing Technology)	150-200
Kennedy Valve (McWane Inc.)	350-499
Schweizer Aircraft Corporation	400-499
St. Joseph's Hospital	1,000-1,200
Star-Gazette	300-400
Synthes	100-200
Taylor Corporation	250-300
Thomas and Betts	500-750
Travelers Insurance	250-499
Trayer Products	200-249
Vulcraft of NY, Inc.	200-300

Source: US Census, 1997

Exhibit 4.11: Chemung County Industries





4.2.2.1 Tourism

Chemung County's location at the southern tip of the Finger Lakes region (See Exhibit 4.12) makes it an ideal place for tourism to prosper and grow in the future. The Finger Lakes have long been a popular tourist destination and tourism is an important (albeit seasonal) part of the economy. The completion of I-86 will facilitate travel to and through the region and will provide new opportunities to attract additional tourists to the area. Chemung County is located within a five hour drive of many major

cities in the U.S. and Canada. Research shows that travelers in the U.S. and Canada are willing to drive five to seven hours to reach a destination. Considering this willingness to drive, the tourism market for the region can be considered to be nearly 200 million people within a 200-mile radius of Chemung County. Tourism is one of the fastest growing industries in the United States and Canada and also in New York State, and if the market for tourism can be tapped, it will help the area diversify its economic base and improve employment opportunities.

Exhibit 4.12: Chemung County's Proximity to the Finger Lakes





4.2.2.2 Economic Development

Recent projects point to the potential for new economic development in the region. In July 2004, Chemung County announced the receipt of its third Build Now-NY² site, the White Wagon Road Distribution Center. Southern Tier Economic Growth is developing the 180-acre site, which is located immediately adjacent to Interchange 59A of I-86 in the Town of Chemung. This will provide an ideal site for distribution centers in the Southern Tier and demonstrates how the completion of I-86 will help restore the region as an attractive, convenient and affordable place to locate businesses. Earlier this year, the Airport Corporate Park South site, a 250-acre multi-use Business and Technology Park in Big Flats, received a \$75,000 grant under the Build Now-NY program. Each of these examples shows that the region's investment in infrastructure will pay dividends by helping to attract businesses and employers to the region well into the future.

4.2.3 TRAVEL BEHAVIOR

At the heart of transportation planning is how people choose to travel between home and the places where they work, play, socialize and other activities. The purpose of the section that follows is to describe various aspects of the region's travel behavior, asking questions about how people get to work and how long that trip takes them. Many of the answers to these questions come from the census, which estimates the data based on surveys sent to a subset of households.

The 2000 U.S. Census indicated that Chemung County residents overwhelmingly chose automobile travel as their primary mode of transportation. Of Chemung County's workers age 16 or over, 81.1% drove alone as their primary means of transportation to work and 10.6% carpooled. From 1990 to 2000, the modal share of public transportation (which includes taxicab trips) declined by 38.9% and the modal share for biking and walking declined by 18.5%. These results are summarized below in Exhibit 4.13.

² Build Now-NY is a program that provides matching grants of up to \$75,000 to assist with the "soft costs" of pre-permitting sites in order to make them ready for development or redevelopment.



Exhibit 4.13: Travel Mode, 1990 and 2000

	Subject	1990 Census		2000 Census		Change 1990 to 2000	
		Number	Percent	Number	Percent	Number	Percent
MEANS OF TRANSPORTATION TO WORK	Workers 16 years and over	40,325	100	38,451	100	-1,874	-4.6%
	Drove alone	31,171	77.3	31,199	81.1	28	4.9%
	Carpooled	5,132	12.7	4,061	10.6	-1,071	-16.5%
	Public transportation (including taxicab)	731	1.8	432	1.1	-299	-38.9%
	Bicycle or walked	2,160	5.4	1,704	4.4	-456	-18.5%
	Motorcycle or other means	250	0.6	170	0.4	-80	-33.3%
	Worked at home	881	2.2	885	2.3	4	4.5%

Source: 1990 and 2000 U.S. Census

For workers who did not work at home, the mean travel time to work was 19.3 minutes. Of the 37,565 workers who did not work at home, 41.6% worked 10 to 19 minutes away, 20.7% worked 20 to 29 minutes away, and 19.9% worked less than 10 minutes away.

The choice of mode did not vary by travel time, except for trips under ten minutes, where walking and biking played a larger role.



Exhibit 4.14: Travel Time and Mode for Home-Based Work Trips, 2000

Means of Transportation	Mean travel time to work (minutes)	Travel time to work					
		Workers who did not work at home	Less than 10 minutes	10 to 19 minutes	20 to 29 minutes	30 to 44 minutes	45 or more minutes
Workers who did not work at home	19.3	37,565	7,490	15,635	7,775	4,115	2,550
Drove alone	19.3	31,200	5,705	13,465	6,600	3,445	1,990
Carpooled	20.8	4,060	700	1,600	905	455	395
Public transportation (including taxicab)	30.4	430	4	120	95	100	110
Bicycle or walked	9.7	1,705	1,020	405	145	100	30
Motorcycle or other	44	170	55	40	30	15	30

Source: U.S. Census

In addition to these questions about how people commute to work, it is important to examine when commuting occurs, especially because in Chemung County between 1990 and 2000, some dramatic changes occurred, as shown in Exhibit

4.15. Commuting in the normal rush hour (8-9AM) decreased by nearly 25% during this decade while late morning (10AM-12PM) and very early morning (12-5AM) increased by 19.3% and 20.3%, respectively.

Exhibit 4.15: Commute Departure Time, 1990 and 2000

		1990 Census		2000 Census		Change 1990- 2000	
		Number	Percent	Number	Percent	Number	Percent
Workers who did not work at home		39,444	100	37,566	100	-1,878	-4.8
TIME LEAVING HOME TO GO TO WORK	5:00 a.m. to 6:59 a.m.	9,294	23.6	9,654	25.7	360	3.9
	7:00 a.m. to 7:59 a.m.	12,525	31.8	12,284	32.7	-241	-1.9
	8:00 a.m. to 8:59 a.m.	6,747	17.1	5,148	13.7	-1,599	-23.7
	9:00 a.m. to 9:59 a.m.	1,799	4.6	1,658	4.4	-141	-7.8
	10:00 a.m. to 11:59 a.m.	996	2.5	1,188	3.2	192	19.3
	12:00 p.m. to 11:59 p.m.	7,365	18.7	6,770	18	-595	-8.1
	12:00 a.m. to 4:59 a.m.	718	1.8	864	2.3	146	20.3

Source: 1990 and 2000 U.S. Census



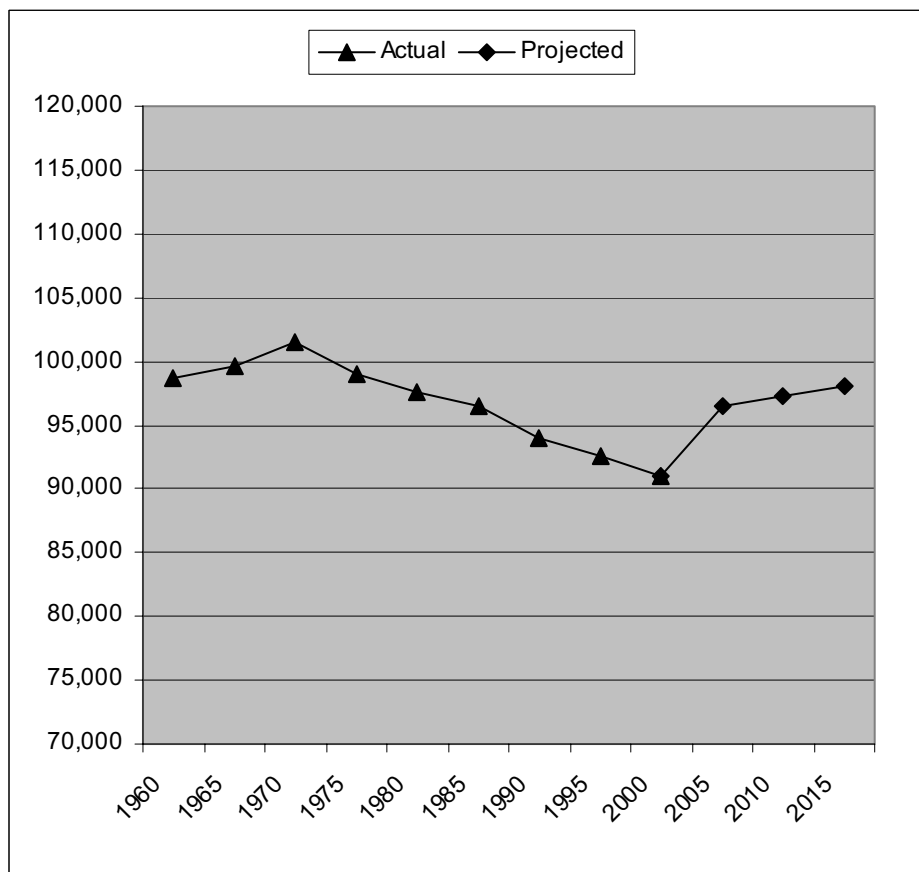
4.3 Future

4.3.1 DEMOGRAPHIC PROJECTIONS

There is inherent uncertainty in all forecasts. In making demographic projections for Chemung County, the Chemung County Planning Department

uses Census data which predicts that Chemung County population will begin to grow by over 5,000 people in the next five years and then steadily continue to grow until the 2015 population reaches 98,086 people. This projection is illustrated in Exhibit 4.16 below.

Exhibit 4.16: Chemung County Population Projections



Source: U.S. Census

While there is debate concerning how the overall population will change in the next 20 years, there is agreement that I-86 will have a positive impact on Southern Tier development and that the elderly population of the region will continue to grow rapidly. Though not reflected in the Census projection, the January 2000 I-86 impact study predicted that the Southern Tier will see

an increase in residents as a result of the completion of I-86. As the "baby boomers" reach retirement age and life expectancy continues to increase, the elderly population will represent a much larger percentage of the county's total population. Using the population projections by age prepared by STC, the percent of the population age 65 or older will increase from the 2000 level of



15.6% to 22.7% in 2030. These results are summarized in Exhibit 4.17.

With nearly a quarter of the population being elderly, the transportation system will need to adapt to meet the elderly population's specific transportation needs.

Exhibit 4.17: Age Distribution of Population Projection (Table)

		2000	2010	2020	2030
		% of Total Population	% of Total Population	% of Total Population	% of Total Population
Age	0-19	27.16%	25.29%	24.51%	24.00%
	20-44	34.27%	31.02%	30.73%	30.61%
	44-64	22.94%	27.81%	25.33%	22.67%
	65 & up	15.62%	15.89%	19.43%	22.72%
Total		100.00%	100.00%	100.00%	100.00%

Source: STC

4.3.2 ECONOMIC FORECAST

Another key influence on transportation demands is economic growth. According to Global Insight³, which measures economic growth by gross regional product (GRP) in constant dollars, the Southern Tier's economic growth will continue, but at a much slower pace than during the late 1990s when the entire nation was enjoying a period of great economic prosperity. GRP growth in the Binghamton-Elmira area slowed 2.1% in 2001 and 2.9% in 2002 (following an increase of 5.6% in 2000). Growth slowed further in 2003 and is expected to slow in 2004 before increases of more than 2% begin in 2005. Personal income is expected to grow 5% in 2004 and then return to the 4% range in 2005 and 2006.

Manufacturing is a significant component of the economy in the Southern Tier, but has accounted for much of the region's job losses in the past three years. The region's manufacturing employment fell 9.7% in 2002, which was higher than the State's rate of decline (7.9%) and higher than in all other areas of the state except New York City, where manufacturing employment fell 10.1%. The decline continued through 2003 and the Elmira metropolitan statistical area (MSA) suffered a 40% loss of manufacturing jobs between 1990 and 2002. Loss of manufacturing jobs has been replaced by an increasing percentage of jobs in the service industries (professional and business services, education and health services, leisure and hospitality, and other services) and in retail and wholesale trade.

The economic development agency for Chemung County, Southern Tier Economic Growth (STEG), is committed to a three-fold strategy toward economic development. First, STEG will continue to extend its commitment to assisting existing businesses to remain viable in the community. Second, STEG is

³ Spotlight on the Southern Tier, Office of the State Comptroller, July 2003.



preparing new sites for existing businesses to expand and to attract new businesses. STEG is completing the design of an industrial-distribution park in the Town of Chemung at a 180-acre parcel directly off Exit 59A of I-86/Route 17 and will conduct business park development studies for similar sites on Chemung County's south side. Third, STEG will work to initiate a long-term plan to give the region a competitive labor force and economic advantage through a comprehensive strategy that includes: monitoring the changing economic environment, identifying industrial clusters that are growing and those that are declining, and analyzing the existing business base to see who may be impacted by trends and assisting them to transfer to new technologies. In addition, STEG is planning for change by looking at the employee skills of declining industrial clusters, evaluating the ability to transfer skills to growing industrial clusters and establishing training programs to fill the void.

In 2000, a Tourist Development Action Plan was developed for the Catharine Valley Trail Area and many of its findings are applicable to Chemung County as a whole. The report⁴ cited the Travel Industry of America's Travel Trends Research, which indicates that the Catharine Valley Trail is well positioned to serve as a tourist destination based on recent and anticipated trends in the tourism and leisure industries. The report presented a three-year plan to help the area capture a larger share of the tourism market and made specific recommendations on increasing public relations, building on the region's strengths and "packaging" of information on various tourist and historical attractions so that the region becomes a better known destination for recreational activities.



⁴ Catharine Valley Trail: Tourist Development Action Plan, March 2000.



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