

Design Connect

Market Analysis

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Incubator

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Intermodal Traffic Node

Enhances the connection to the region and the country.

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Engages and improves the environment while making Oneonta walkable.

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Parcel Overview

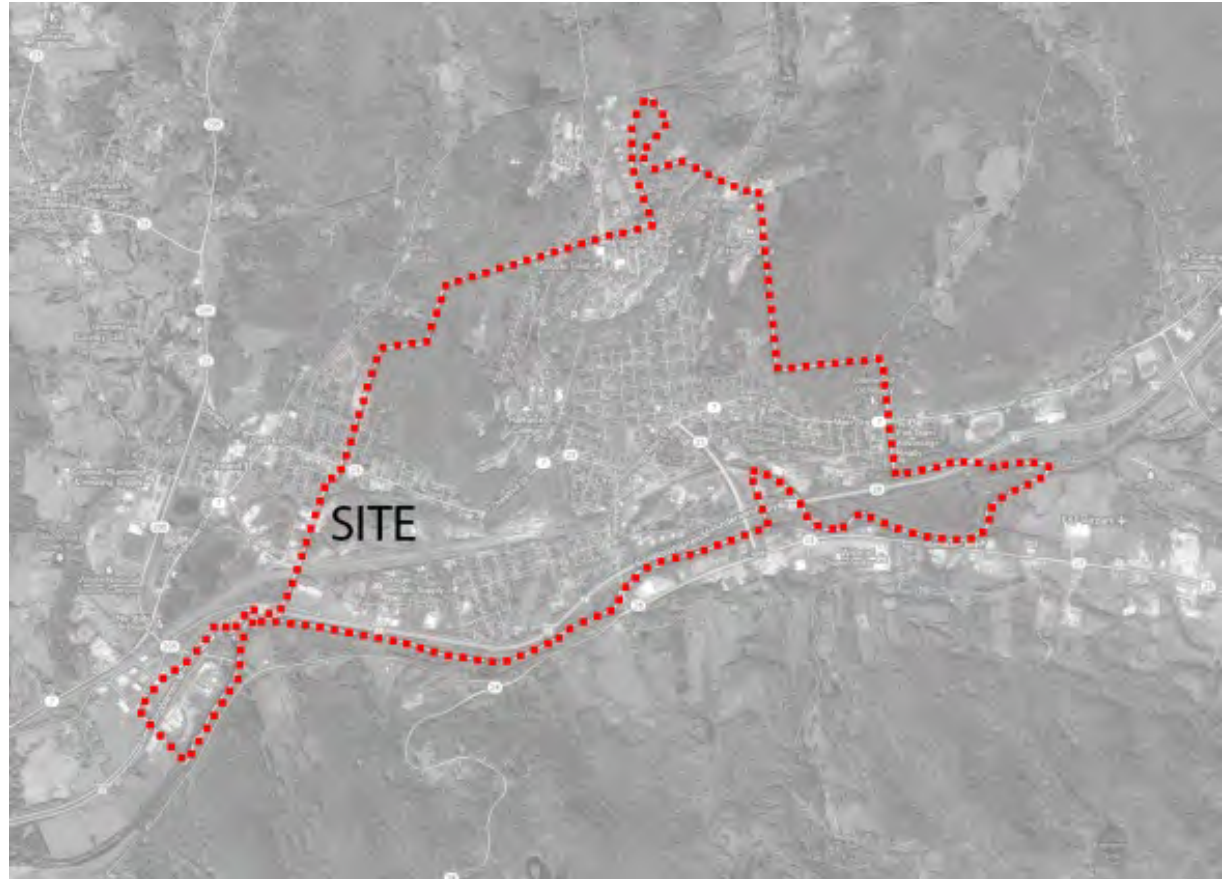
MARKET ANALYSIS

For the City of Oneonta

1. Social & Economic Conditions
2. Retail Market
3. Industrial Market
4. Housing Market
5. Hotel Market

1. Social & Economic Conditions

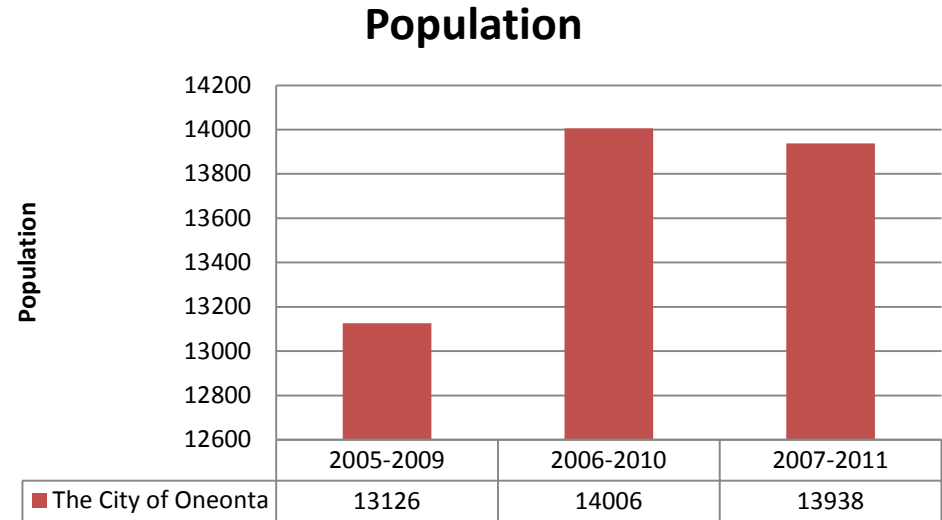
**Primary
Market Research Area:**
The City of Oneonta



1. Social & Economic Conditions

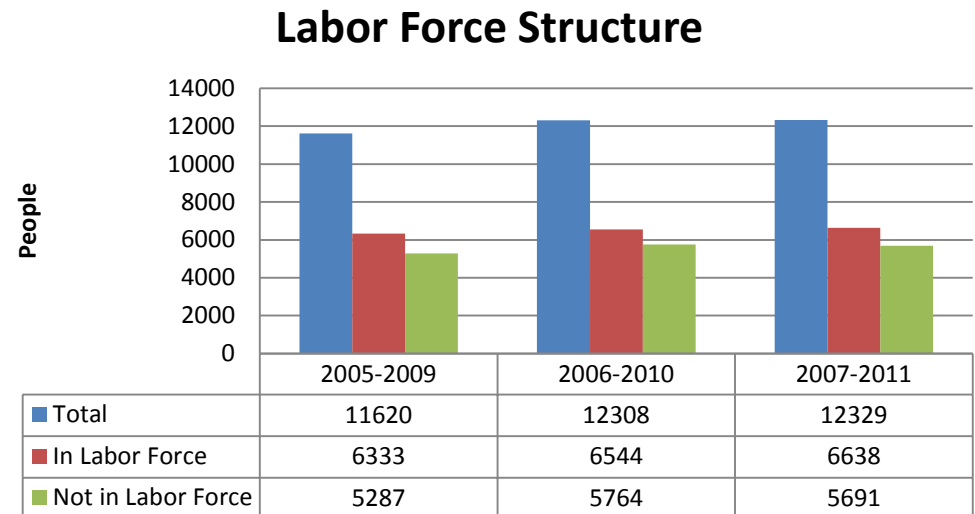
Population:

The population of city of Oneonta increase around 800



Labor Force:

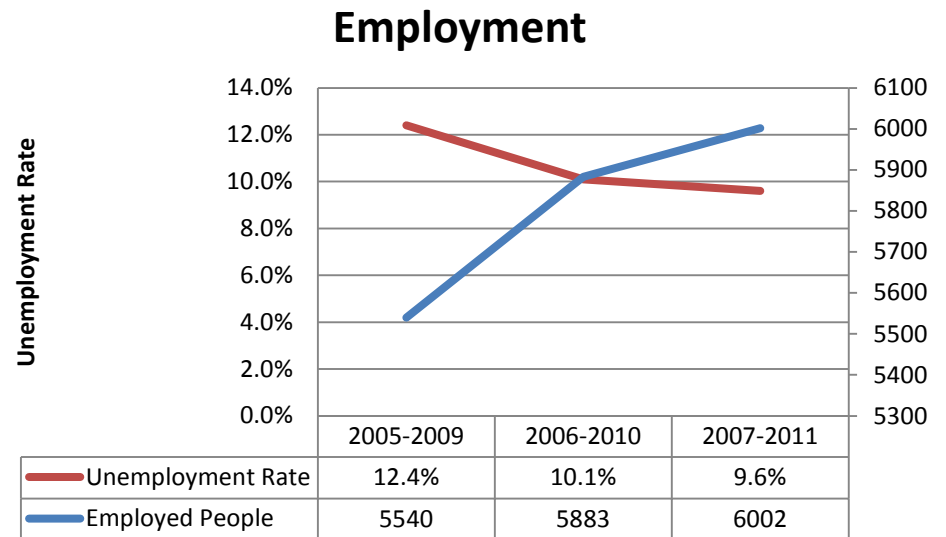
Nearly 50% of people in Oneonta are not in labor force, many of them are students.



1. Social & Economic Conditions

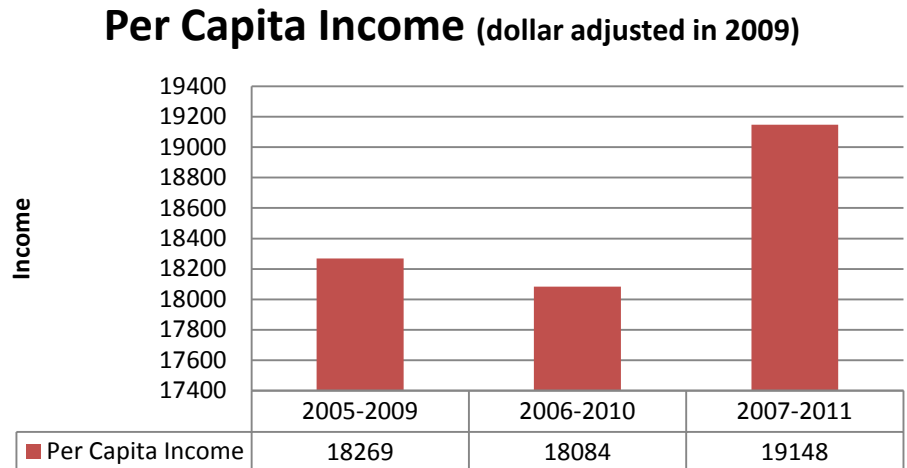
Employment:

- Unemployment rate decreased significantly from 12.4% to 9.6% in past 5 years
- Number of employed people increased by 460



Per Capita Income:

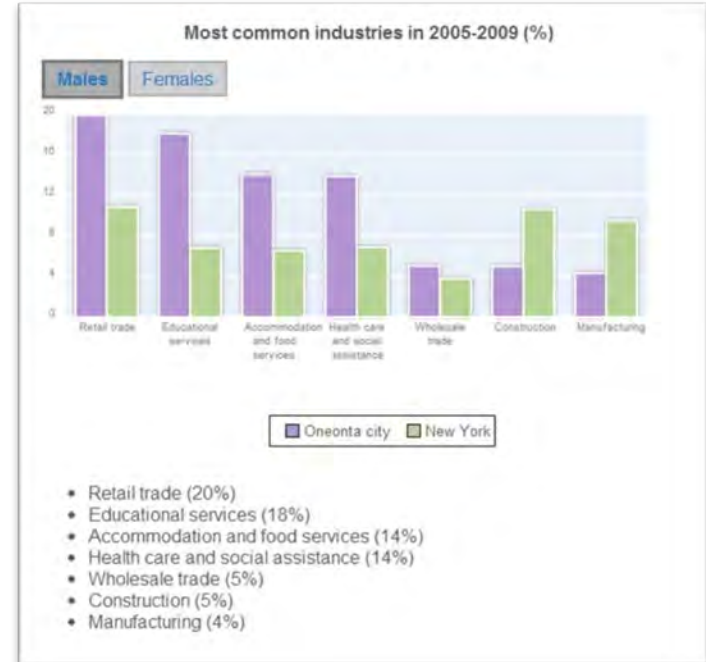
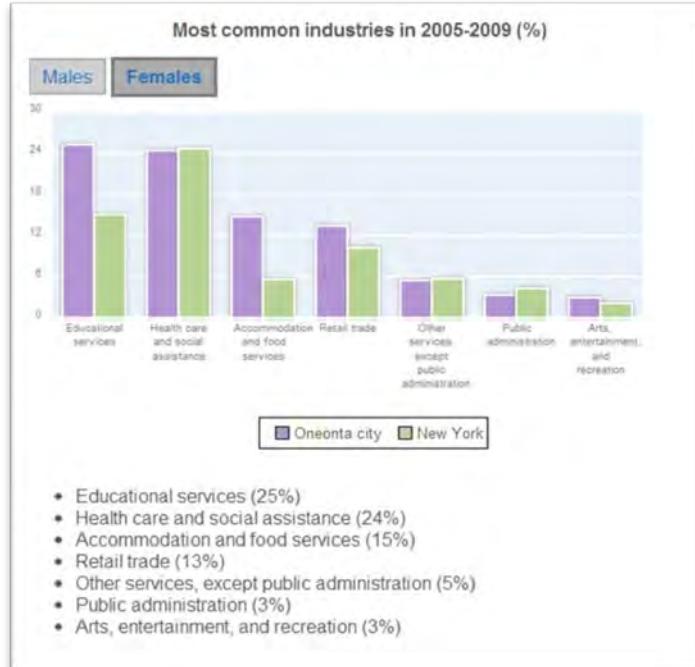
- The per capita income of Oneonta citizens also increased 5.5% from 2005 to 2011



1. Social & Economic Conditions

Main Employment Sectors:

Male	Female
Retail Trade	Education Service
Education Service	Health Care and social Assistance
Food Service	Food Service



2. Retail Market

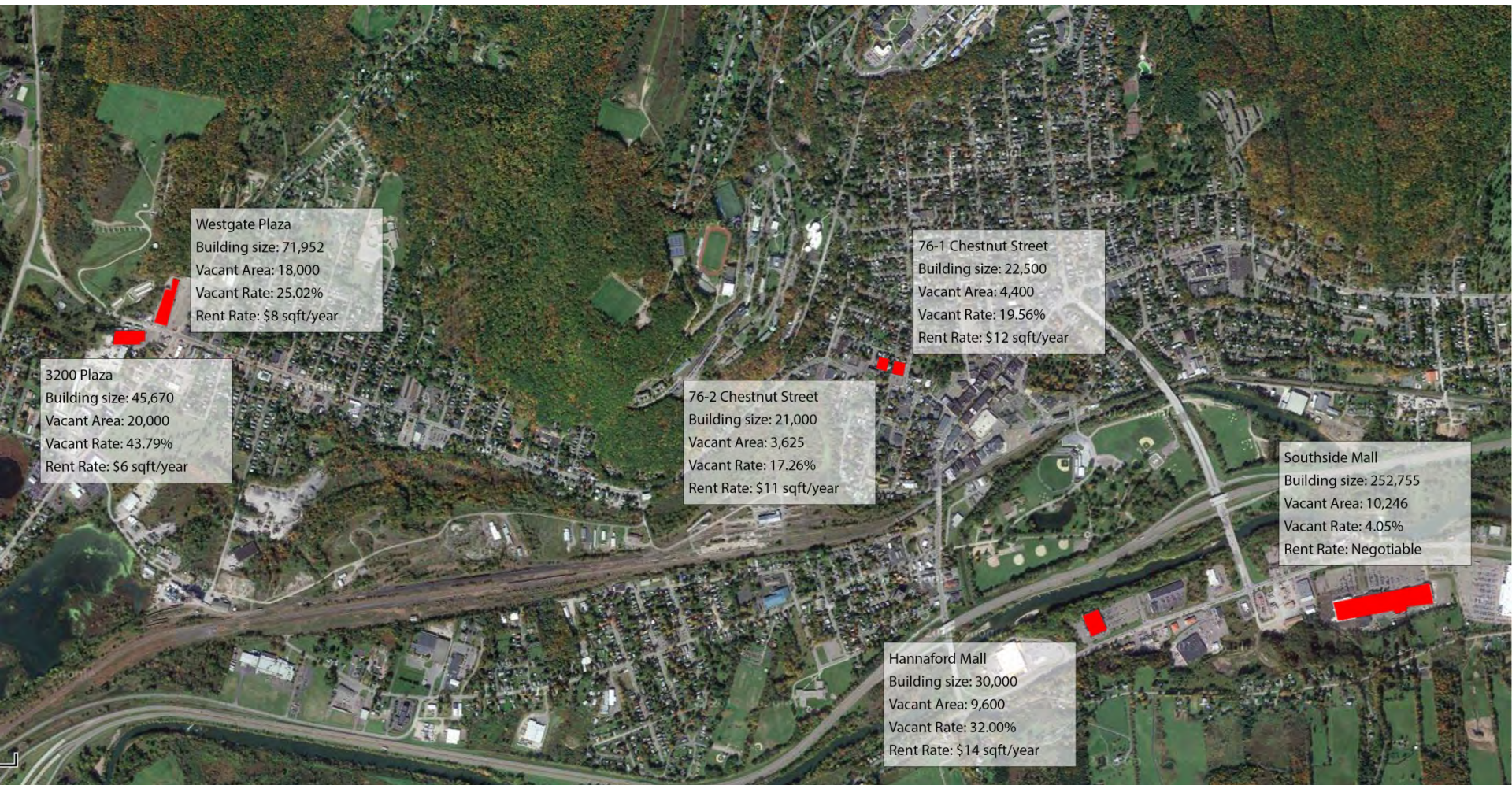
Big-Box Retail:

- Wal-mart
- Tops.....

Niche Players:

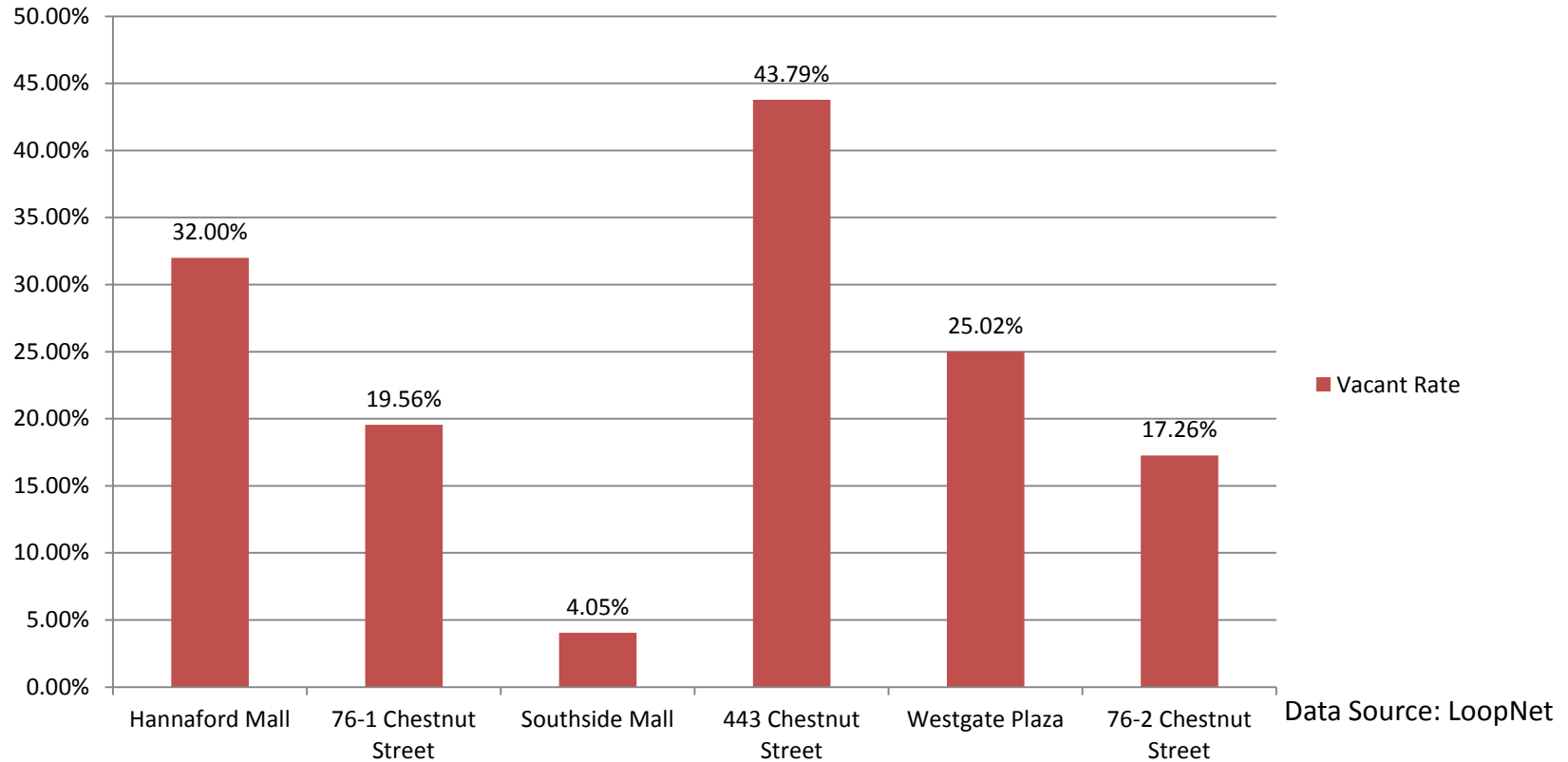
- Special Restaurants
- Book Stores
- Antique Malls

2. Retail Market



2. Retail Market

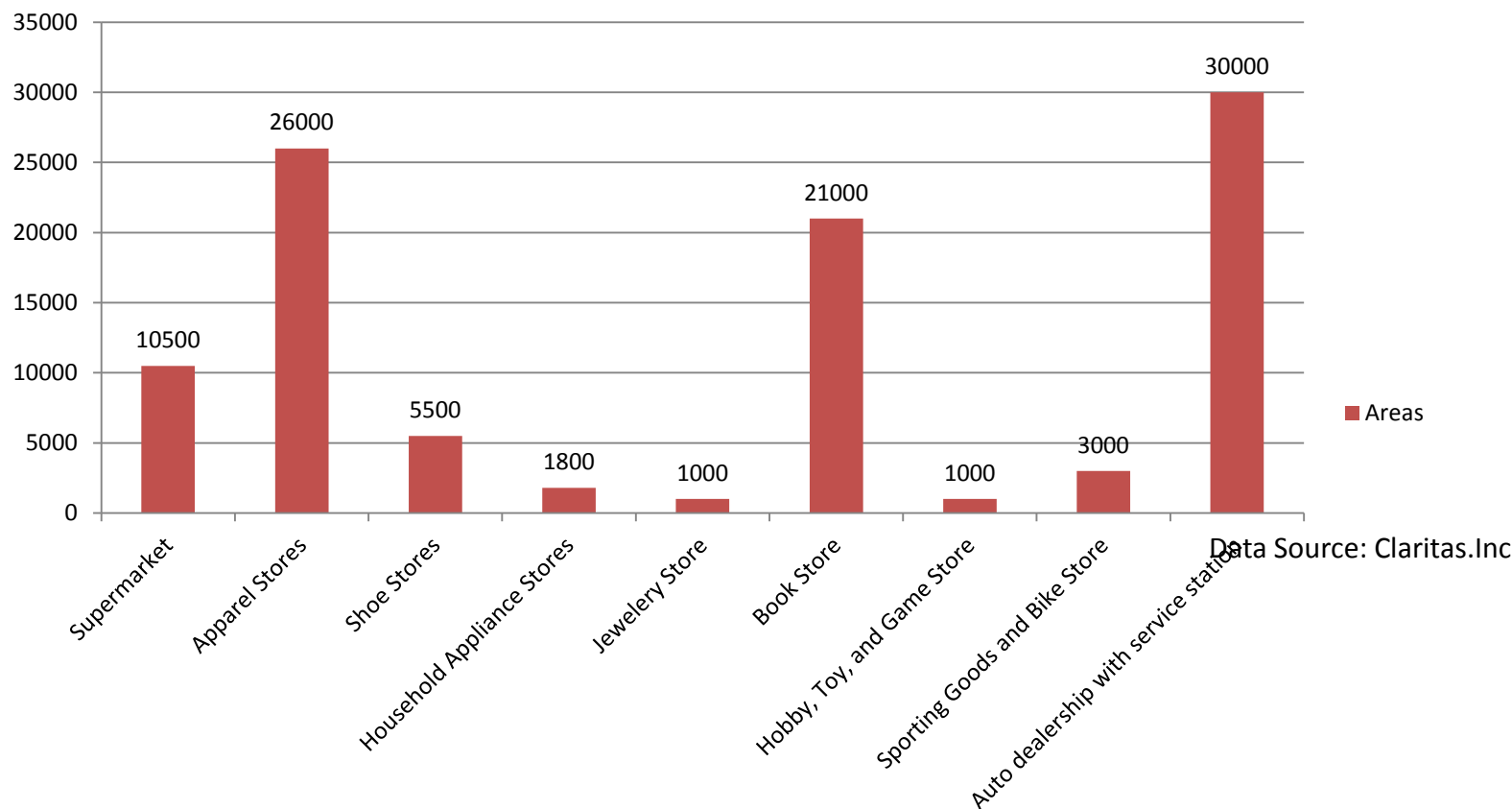
Shopping Mall Vacant Rate



Name	Primary Type	Sub Type	Bldg Size/sf	Price	Total Size	Vacant Rate
5514 State Route 7	Retail	Strip Center	940,896	1,800,000		
Hannaford Mall	Retail	Strip Center	9,600	rent rate 14	30,000	32.00%
76-1 Chestnut Street	Retail	Strip Center	4,400	rent rate 12	22,500	19.56%
Southside Mall	Retail	Strip Center	10,246	Nego	252,755	4.05%
443 Chestnut Street	Retail	Strip Center	20,000	rent rate 6	45,670	43.79%
Westgate Plaza	Retail	Strip Center	18,000	rent rate 8	71,952	25.02%
76-2 Chestnut Street	Retail	Strip Center	3,625	rent rate 11	21,000	17.26%

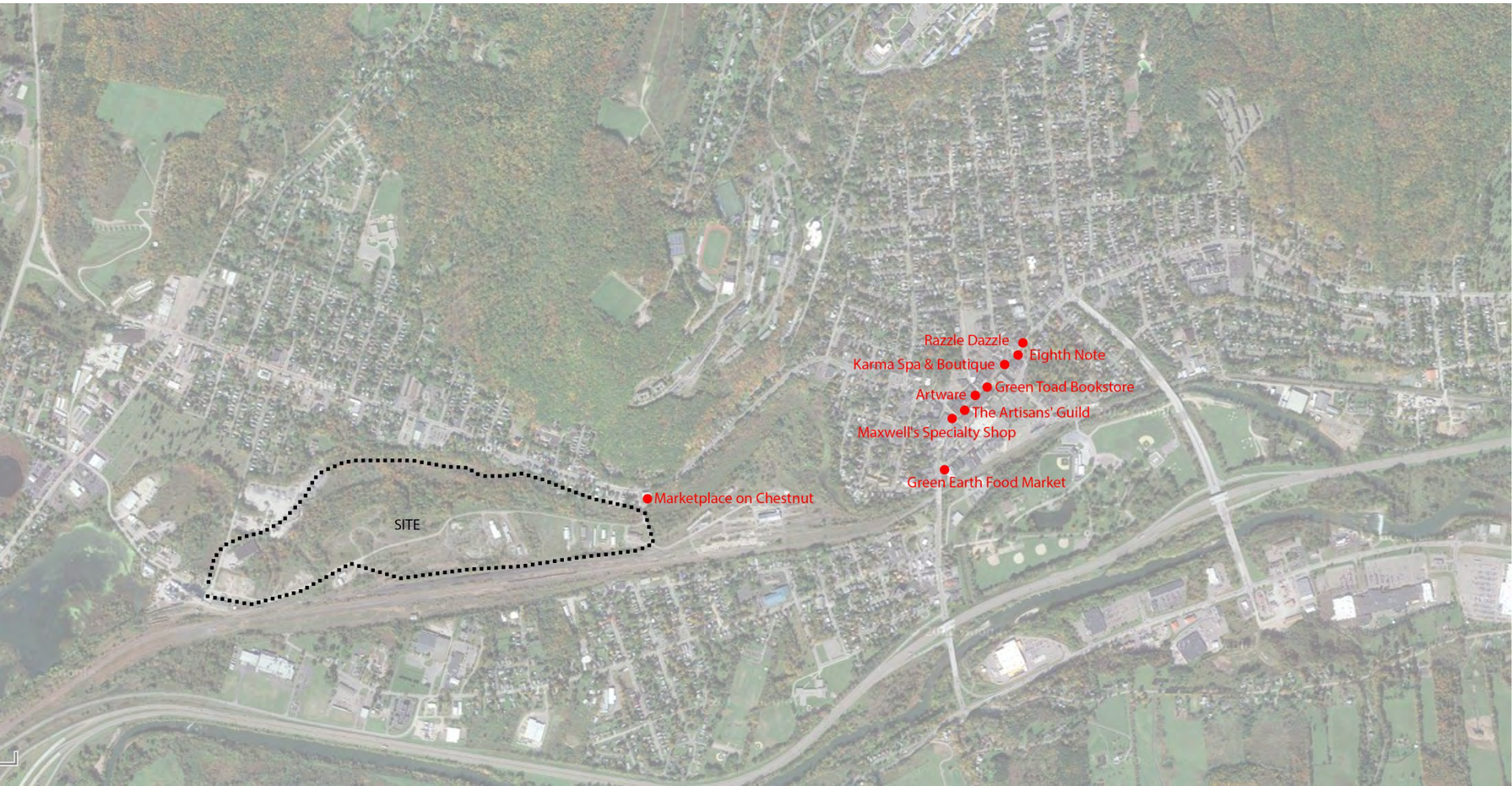
2. Retail Market

New Retail Space Oneonta Can Support



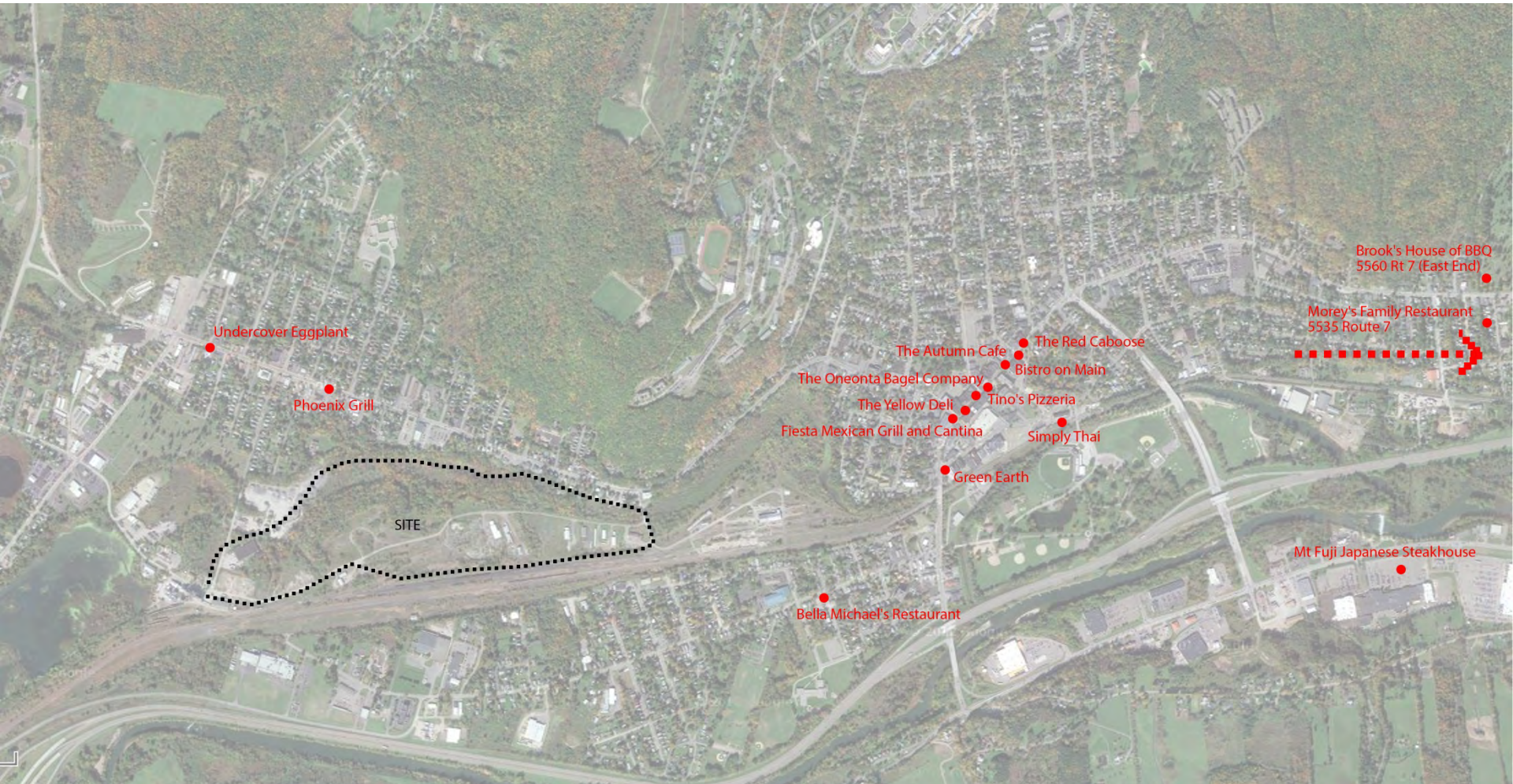
Type	Area/sqft
Supermarket	10500
Apparel Stores	26000
Shoe Stores	5500
Household Appliance Stores	1800
Jewelery Store	1000
Book Store	21000
Hobby, Toy, and Game Store	1000
Sporting Goods and Bike Store	3000
Auto dealership with service station	30000

2. Retail Market



Typical Retail Niche Players

2. Retail Market



Great Restaurants in Oneonta

2. Retail Market

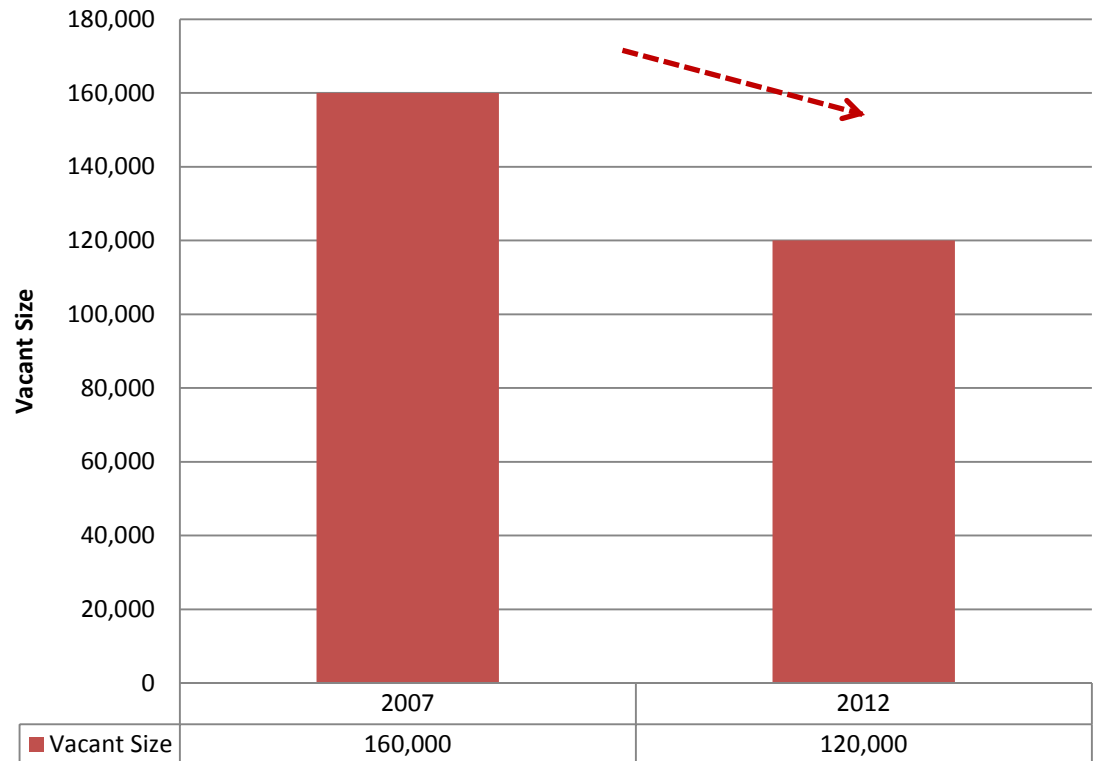
Retail Market Conclusions:

- Moderate Market
- Potential 99,800 sqft Retail Area
 - mainly restaurants, apparel, book stores
- No Shopping Mall
- Niche Players Recommended

3. Industrial Market

A cursory estimation of vacancy size of industry property in Oneonta shows the vacancy size decreases from 160,000 sqft to 120,000 sqft between 2007 to 2012.

Cursory Vacant Size



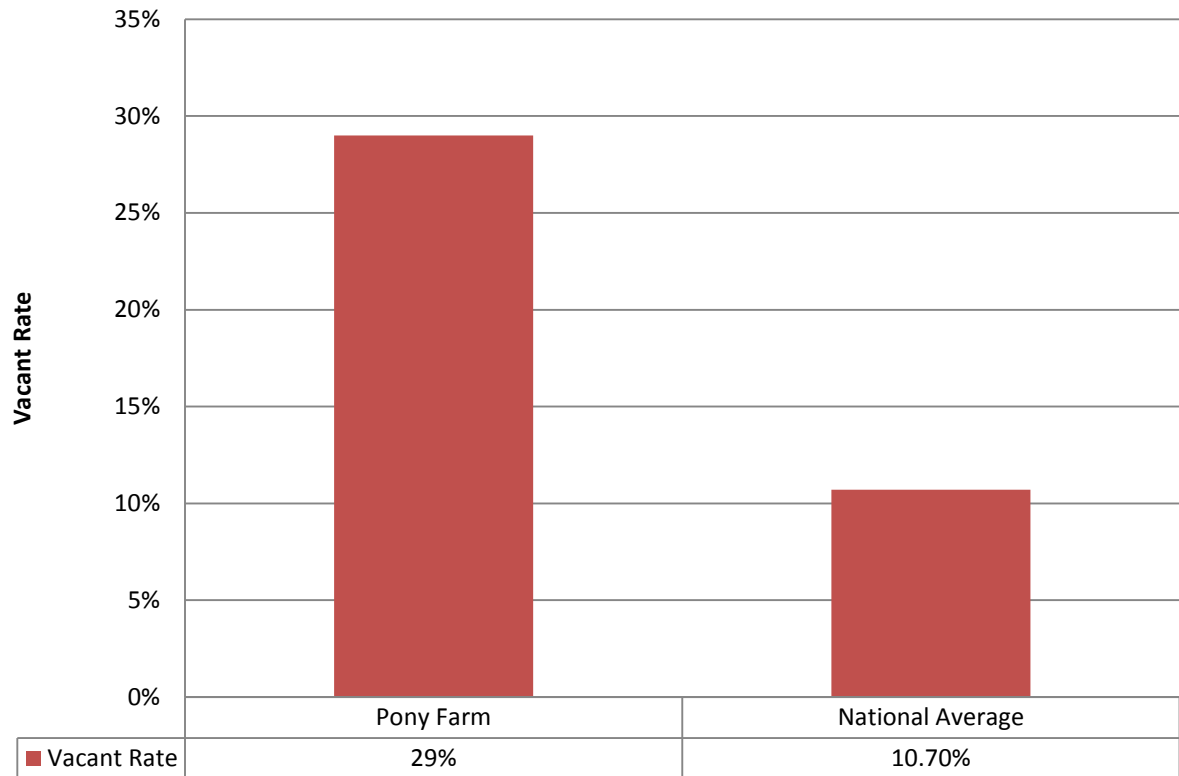
Data Source: Claritas.Inc

Address	Type	Price	Bldg/sqft
152 Corporate Drive	Warehouse	rent rate 7.5	22,000
139 Oneida St	Warehouse	349,900	6,368
Sign Shop	Manufacturing	350,000	13,476
Total			41,844

3. Industrial Market

- Pony Farm is suffering a high vacancy rate at 30%
- National average vacancy rate of industrial property is only 10.7%

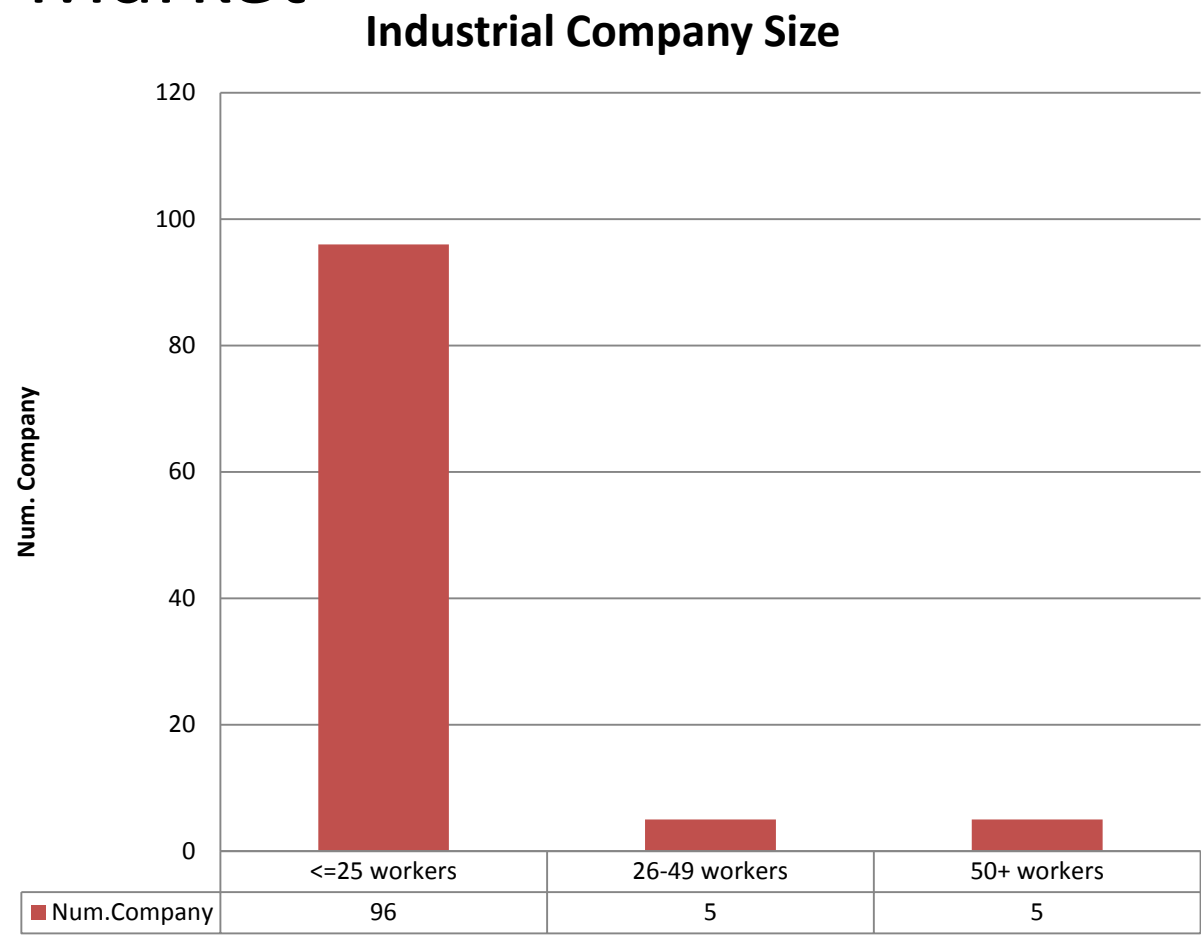
2012: Vacant Rate



Pony Farm	
Previous Renter	Bldg/sqft
Valley Fashion	47000
Covidien	22000
Vacant Rate	29%
National Average	10.7%

3. Industrial Market

Over 90% of Oneonta industrial companies are small companies with fewer than 25 workers



Data Source: Claritas.Inc

Company Size	Number
<=25 workers	96
26-49 workers	5
50+ workers	5

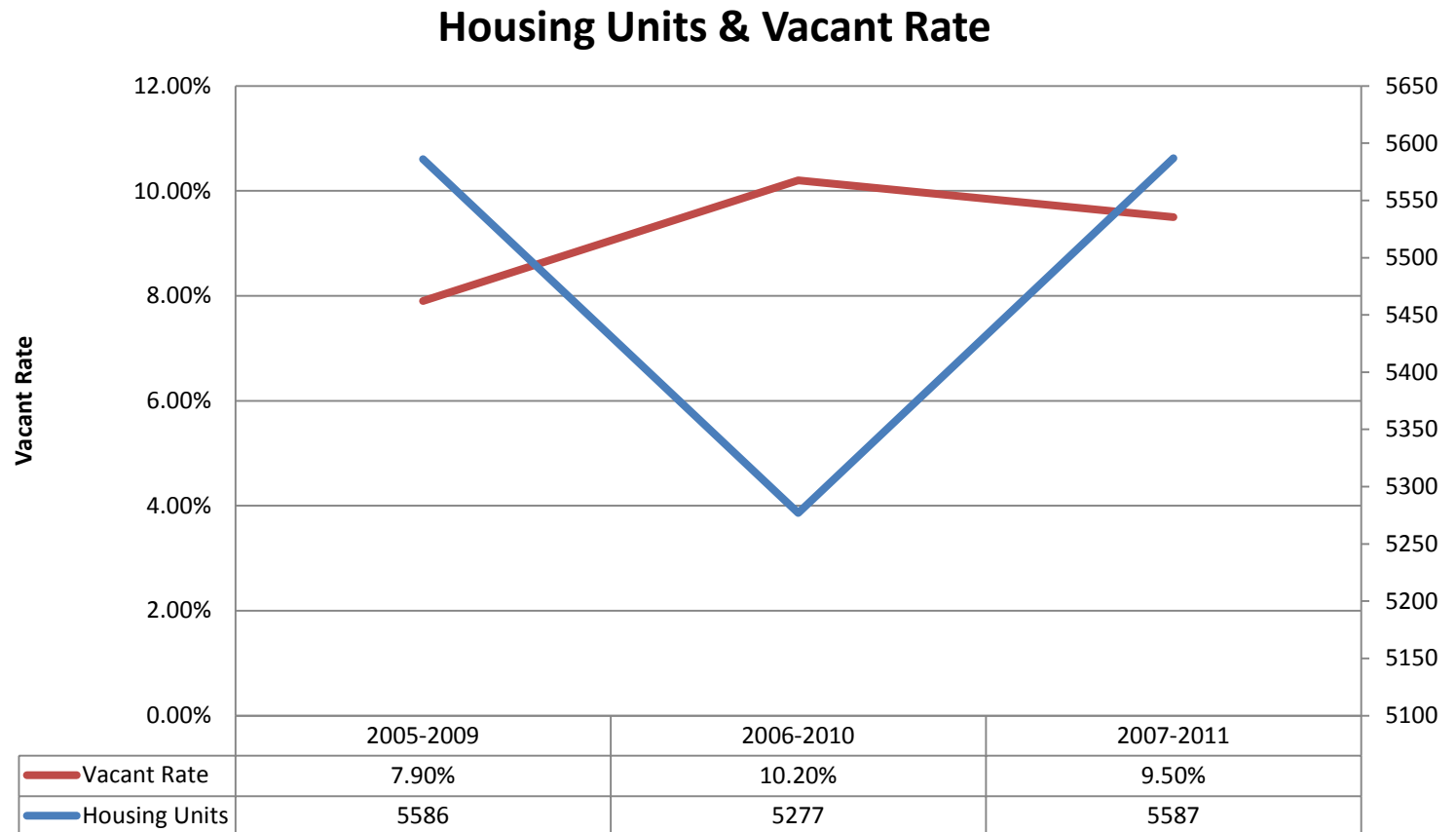
3. Industrial Market

Industry Market Conclusion

- Small Positive Market
- Estimated Absorption rate is 8,000 sqft/year
- Begin with small companies

4. Housing Market

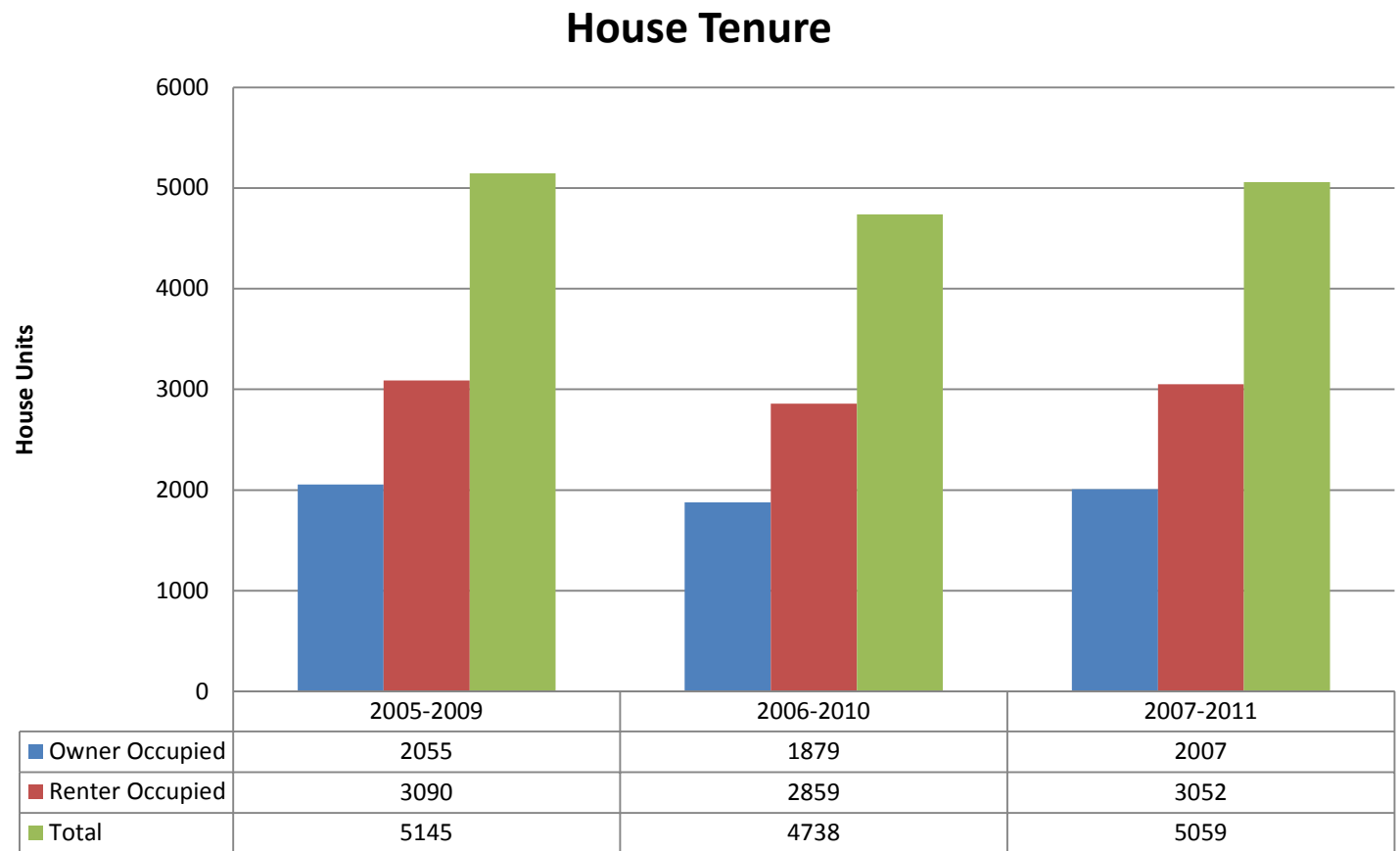
- Housing units increased by 310 units after the economic crisis
- Vacancy rate simultaneously decreased from 10.2% to 9.5%



4. Housing Market

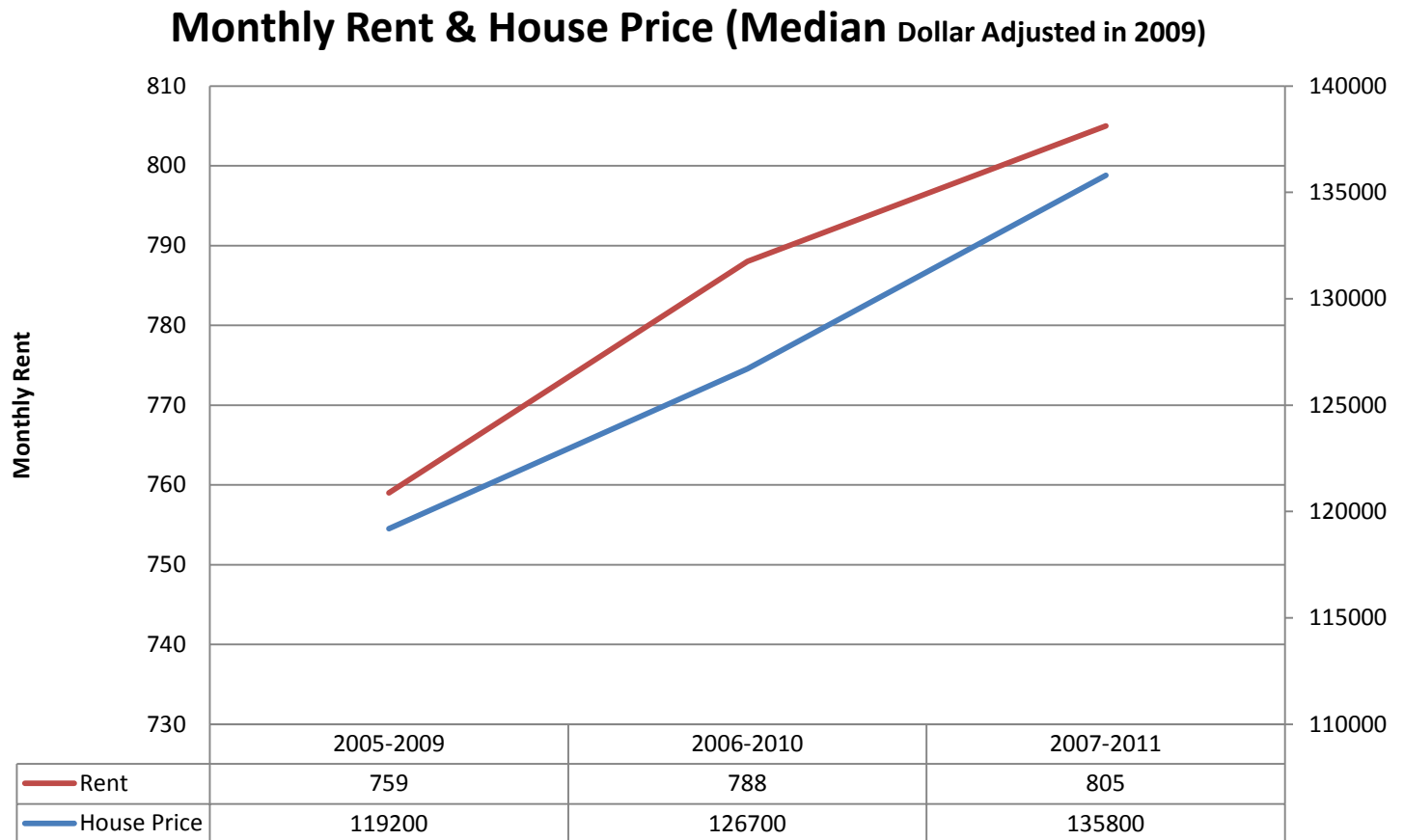
Renter housing Market:

Nearly 60% of all houses are renter occupied houses.



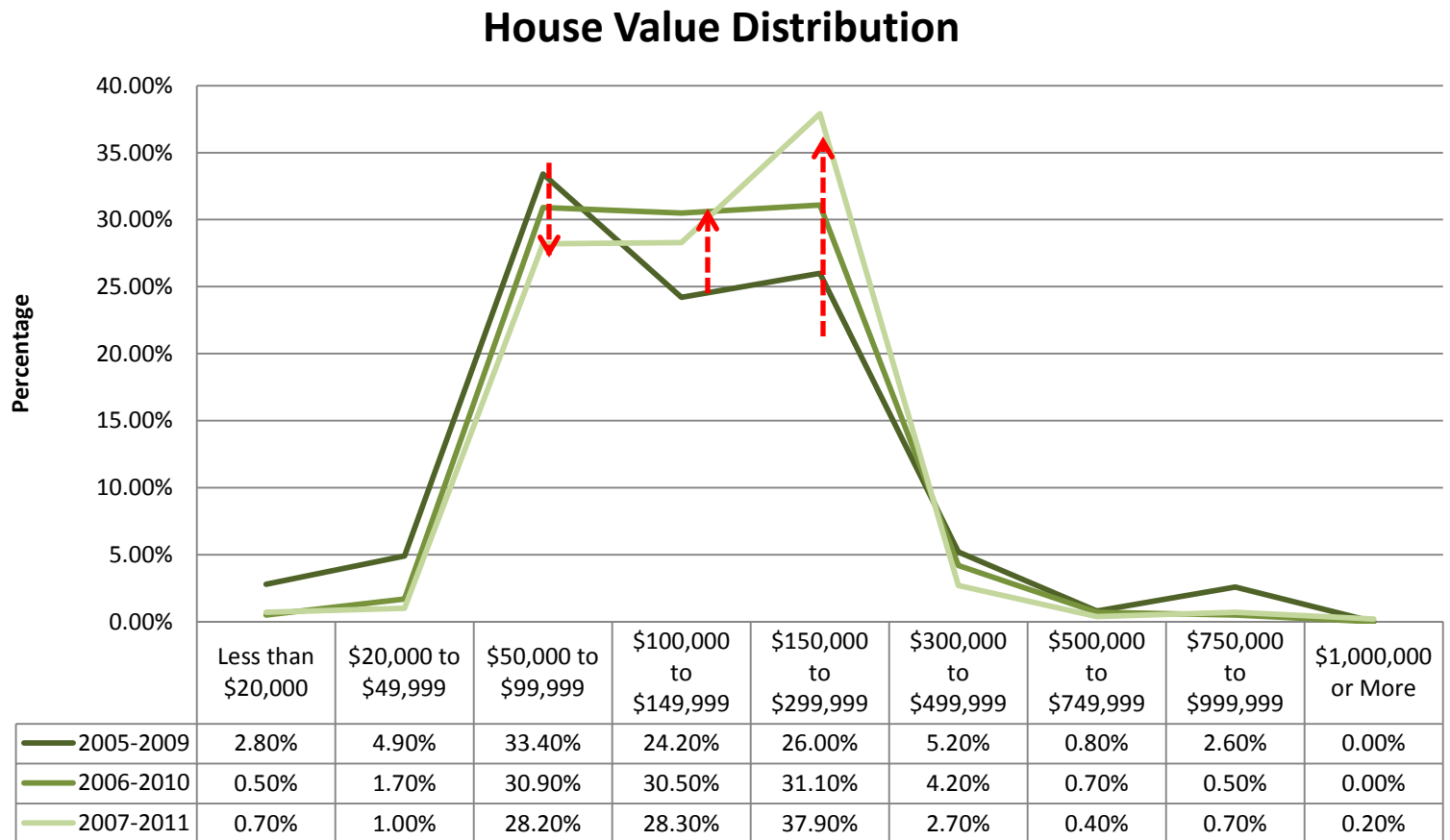
4. Housing Market

Median house price **increased 14%** over the past 7 years and median monthly rent also increased by \$50



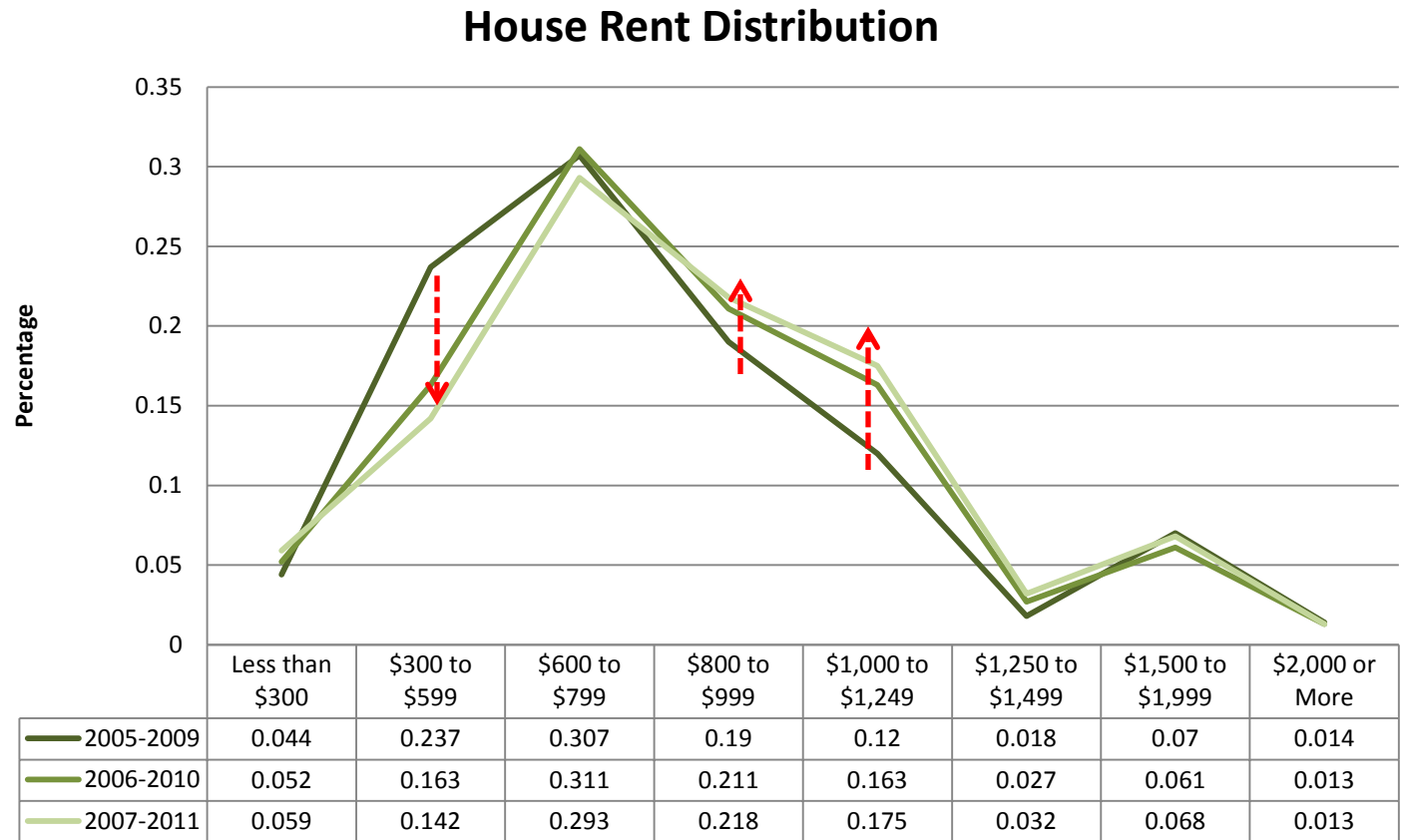
4. Housing Market

People prefer higher-price houses now.



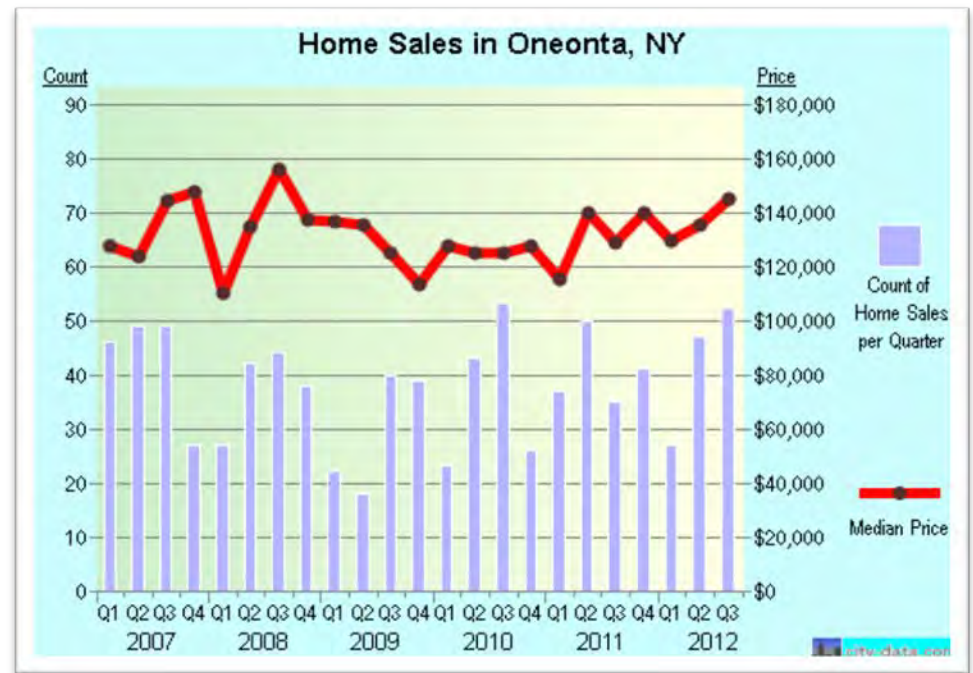
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4, Housing Market

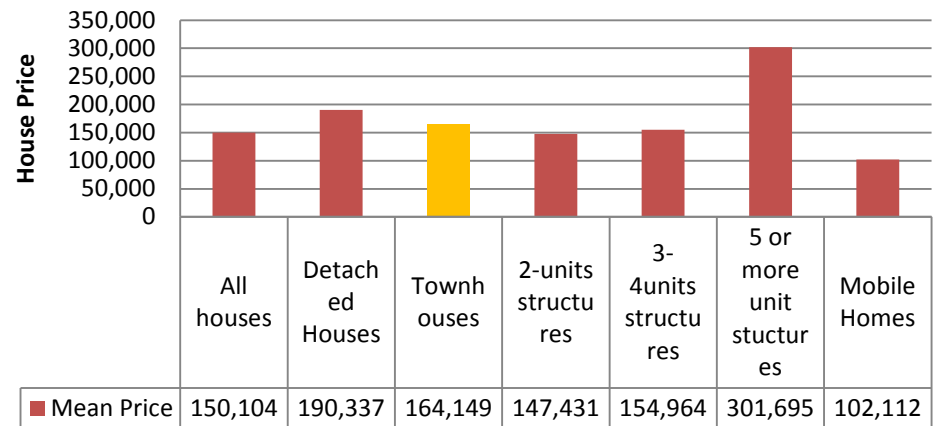
The quarter home sales in Oneonta are around 40



Data Source: City Data

Houses with price ranging from 120k to 180k are most popular.

Mean Price of Different House Types



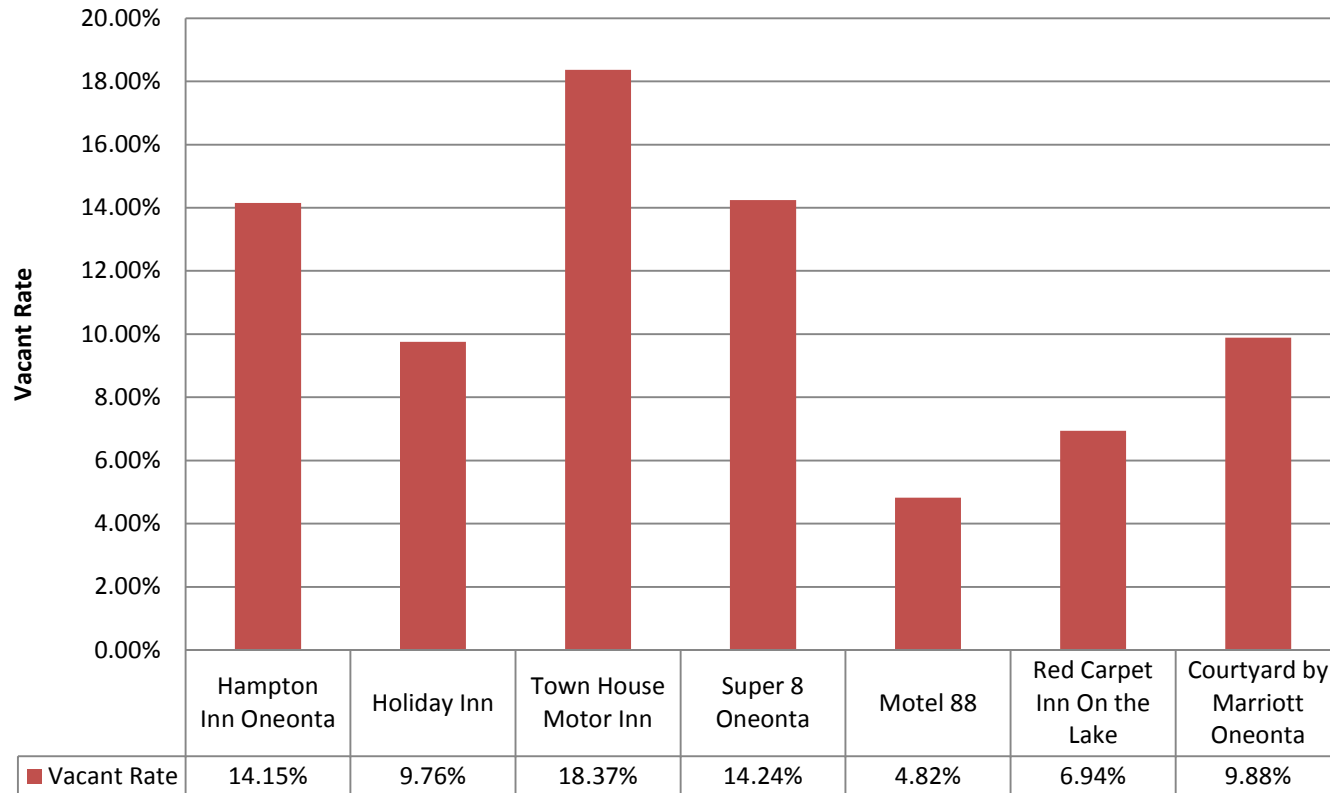
4. Housing Market

Housing Market Conclusion

- Growing Market
- Houses for sale: 35 units/year Price: \$110k ---- \$180k
- Apartments for rent: 55 units/year Price: \$800/month ---- \$1200/month

5.Hotel Market

Vacant Rate of Each Hotel

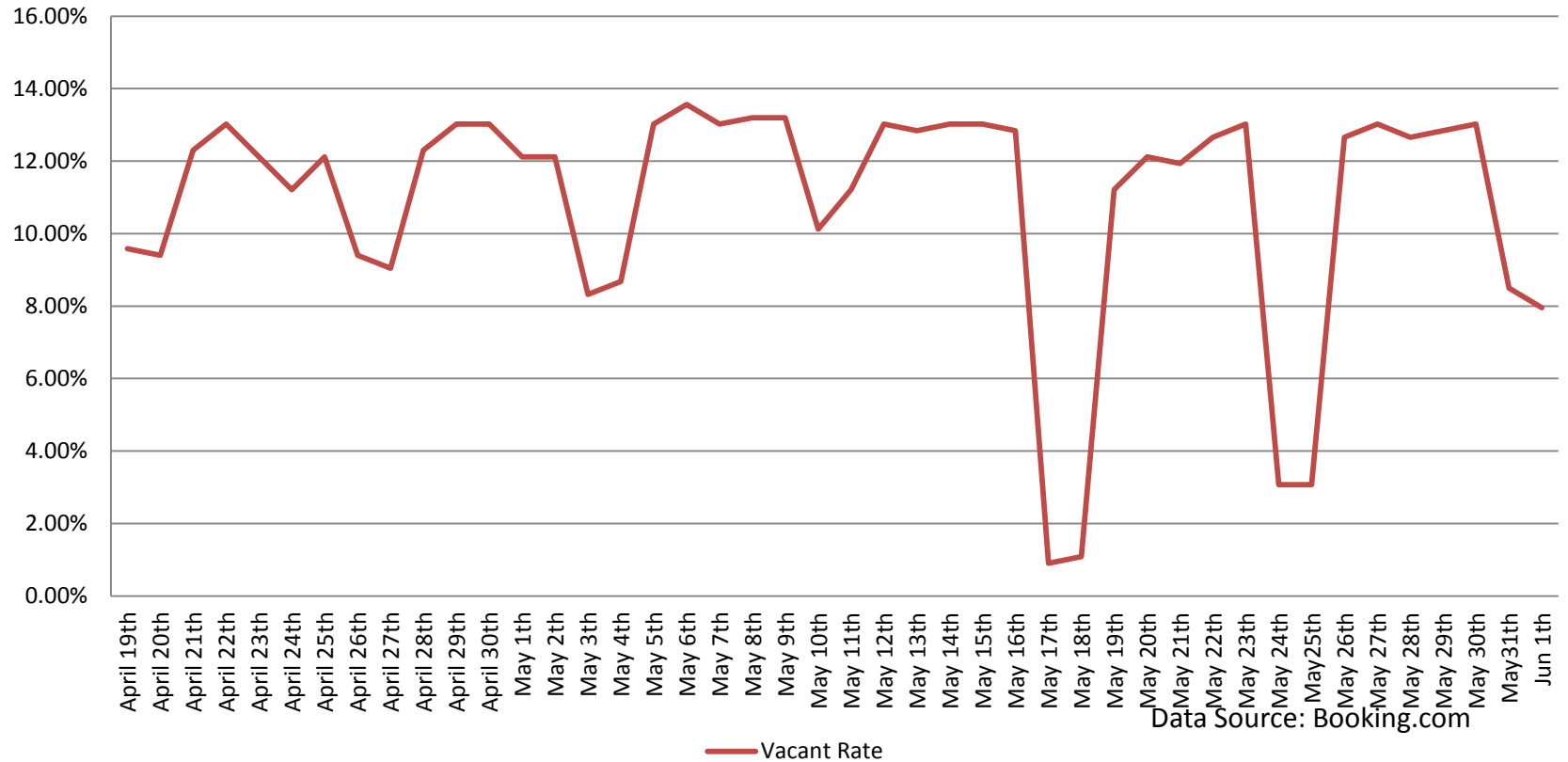


Data Source: Booking.com

Hotels	Total Rooms	Vacant Rate	Rent Rate
Hampton Inn Oneonta	106	14.15%	\$122.00
Holiday Inn	160	9.76%	\$101.25
Town House Motor Inn	37	18.37%	\$69.00
Super 8 Oneonta	60	14.24%	\$55.25
Motel 88	66	4.82%	\$75.00
Red Carpet Inn On the Lake	38	6.94%	\$65.00
Courtyard by Marriott Oneonta	86	9.88%	\$139.00

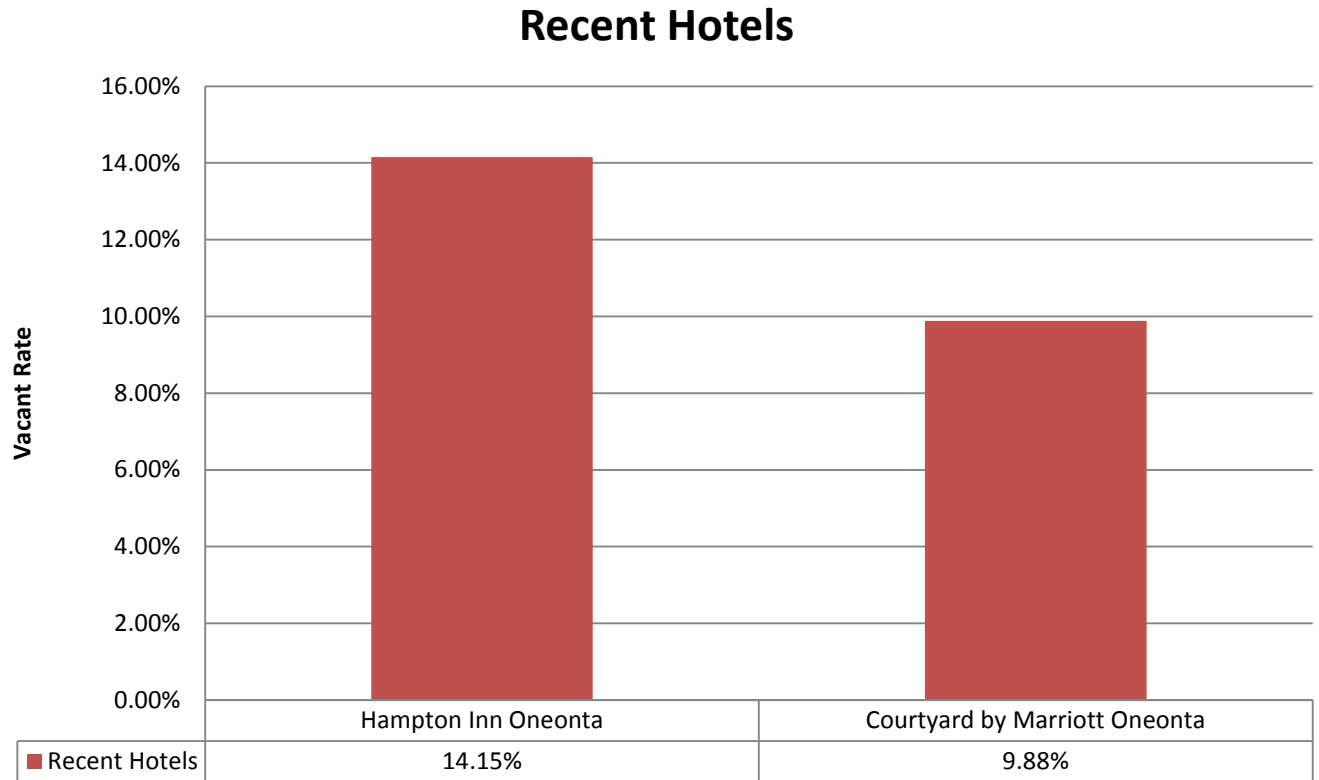
5. Hotel Market

Hotel Vacant Rate Trend



5.Hotel Market

- Courtyard Marriott opened most recently, in 2012
- Courtyard Marriott vacancy rate is 10%



Data Source: Booking.com

Year	Hotels	Total Rooms	Vacant Rate	Rent Rate
2006	Hampton Inn Oneonta	106	14.15%	\$122.00
2012	Courtyard by Marriott Oneonta	86	9.88%	\$139.00

5. Hotel Market

Hotel Market Conclusion

- Moderate Market
- Short-term construction not recommended
- Long-term investment recommended (5-10 years later)

Market Conclusion for **The City of Oneonta**

Industry Small Market
Estimated Absorption rate is 8,000sqft/year
Begin at small companies

Retail Moderate Market
Potential 99800sqft Retail Area
No Shopping Mall
Niche Players Recommended

Hotel Moderate Market
Short-term construction not recommended
Long-term investment recommended

Housing Growing Market
Houses for sale: 35 units/year Price: \$110k ---- \$180k
Apartments for rent: 55 units/year Price: \$800/mo ---- \$1200/mo

Recommended Use for **Our Site**

Type	Pros and Cons of Our Site	Recommended Use of Our Site
Industry	Pros: Rail Way Reuse of existing warehouses Business Incubator Program	Food Distribution Brewery Other small manufactories 10,000 ---- 12,000 sqft
Retail	Pros: Successful niche players around our site Lower land rent than downtown	Antique Malls Book Stores Restaurants 5,000 ---- 8,000 sqft
Hotel	Pros: Landscape Cons: heavy land development costs infrastructure improvements	Not recommended now Possible Hotel investment in future
Housing	Cons: no convenient transportation heavy land development costs infrastructure improvements	Not recommended now Possible House Construction in future

Business Incubator

History

Challenges

Possible Solutions

Potential

Incubator

History

- Incubators linked to Universities
 - Hartwick Telecenter
 - SUNY Fredonia Tech Incubator
- Downtown
 - 250 Main St - Incubator offices (mainly office-type uses)



Challenges for starting a small business





- **Financial:** long-term funding, utility costs, economies of scale
- **Technological:** changing technology
- **Services:** regulations, training
- **Community:** NIMBYist opposition

An incubator would provide:

- **Building/space** at reduced cost
- **Services** in the following: financing, technology, knowledge of regulations and how to start a business, etc.
- **Safety net** and economies of scale

Incubator

Possible solutions to current challenges

- | | | |
|---|---|--|
| • Problem of community/outside opposition to development initiatives |  | • Education and outreach for community members |
| • Retention of skilled labor force |  | • Provide access to services and funding for graduates and community members |
| • Lack of local entrepreneurs |  | • Training and support for local entrepreneurs |
| • Lack of support for business start-ups |  | <ul style="list-style-type: none">• Provide services, training, funding and support network for start-ups• Form cooperatives, work together for best interests (i.e. restaurants with food hub) |

Incubator

Potential

Two Options:

- Combined Incubator Program - glue that holds new businesses at the site together; support network
- Virtual Incubator Program / Service Provider



Possible Users:

- Brewery
- Malting Facility
- Food Hub Facility



Finding a Home for Oneonta's Homebrewers

Approximately 60 Active Members

Centered in Oneonta

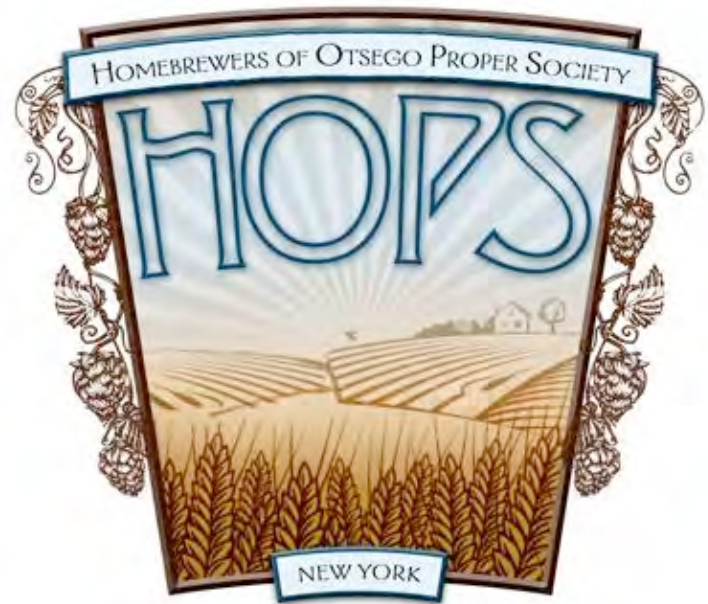
Monthly Get-Togethers

Biannual Fundraising Events

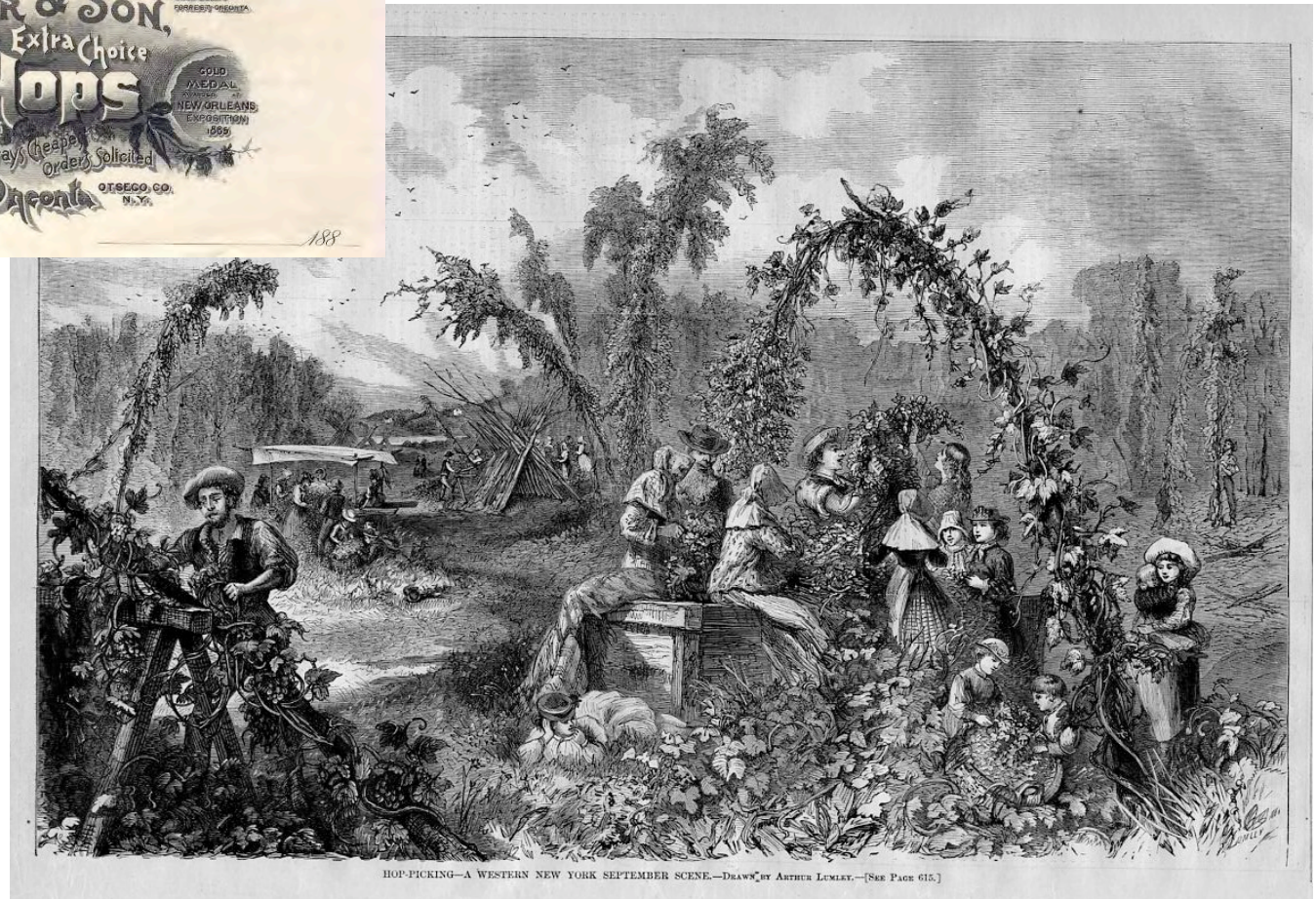
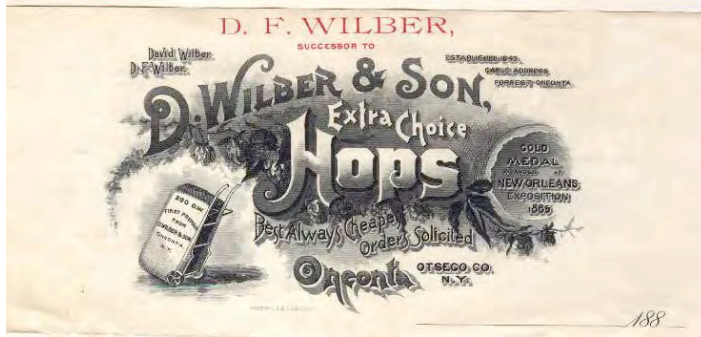
(Saturday, April 20th, to benefit Oneonta Theater)

Several Members Have Been Discussing The
Possibility of a Cooperative Brewery

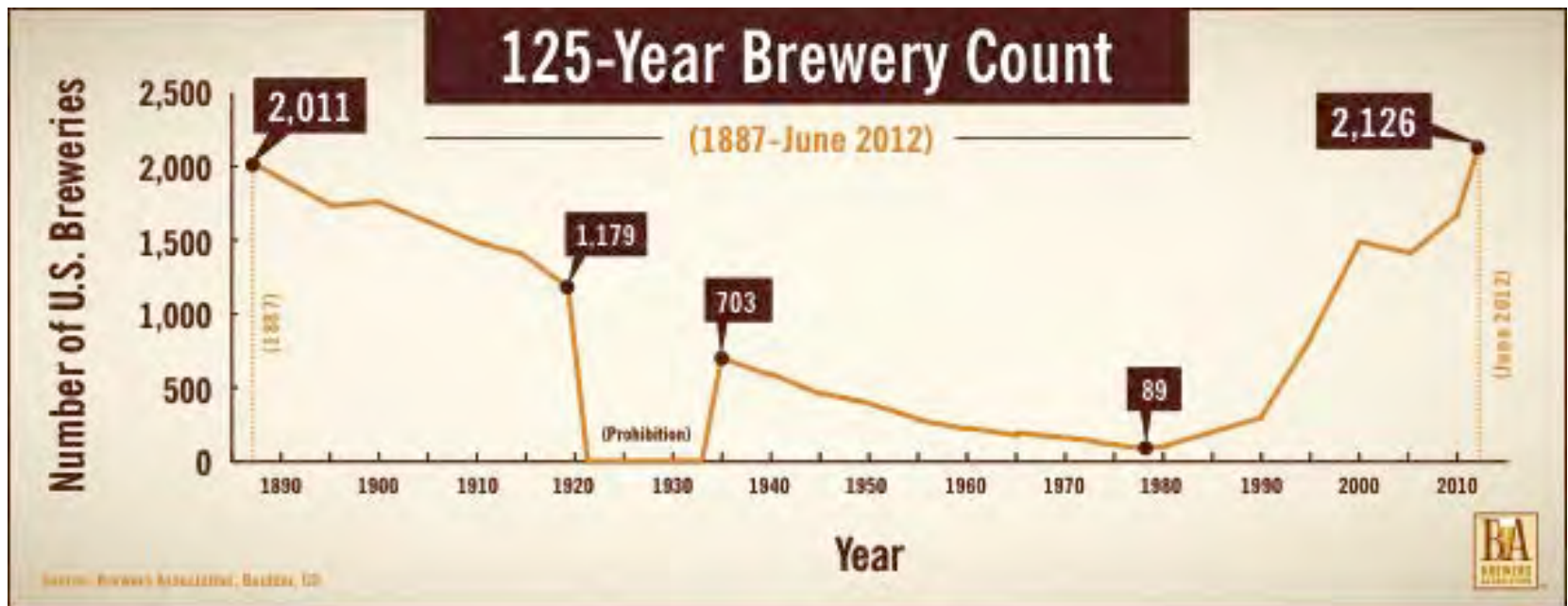
Home-grow a commercial brewer in Oneonta!



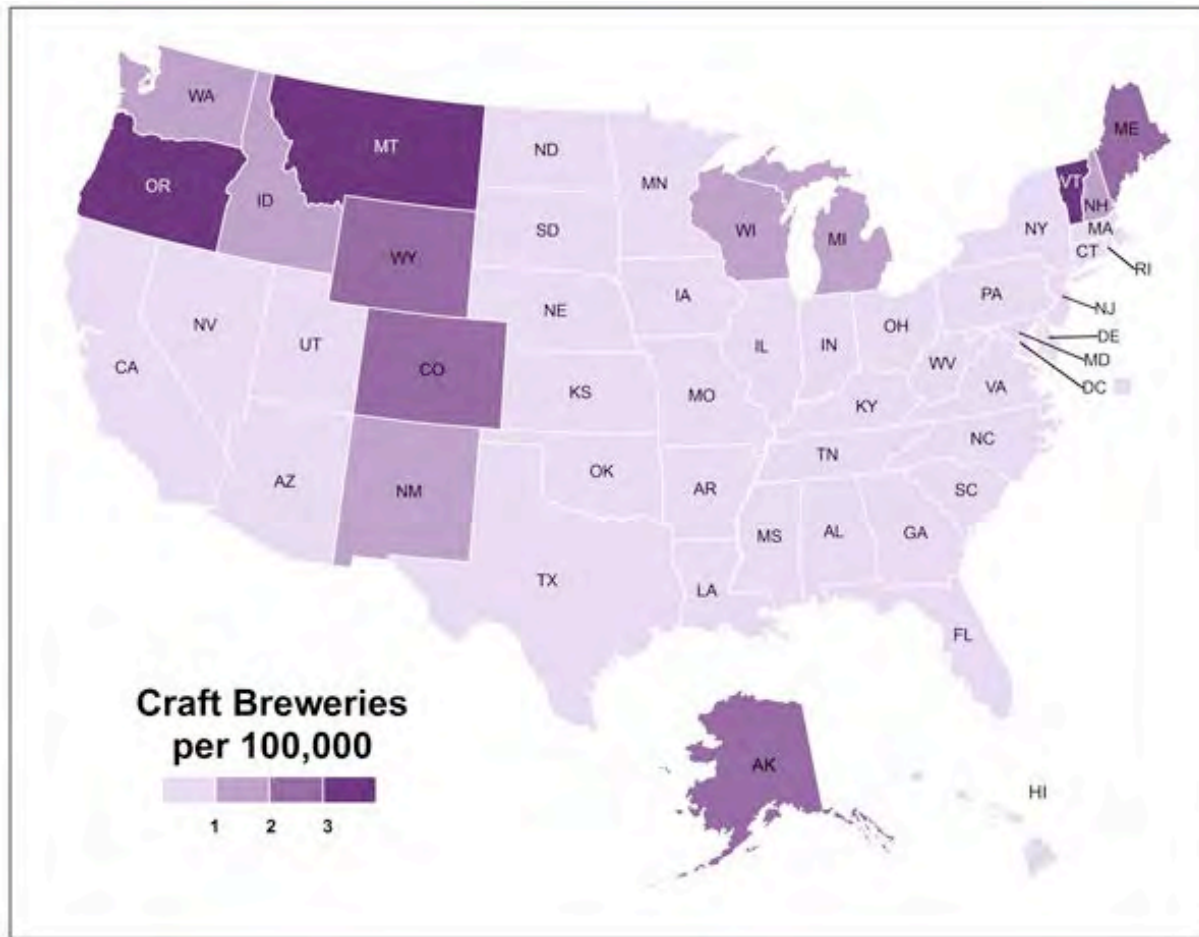
Connecting with Otsego County's Beer History



National Trend in Craft Brewing



NYS Craft Breweries – 40th out of 50 States (2011)



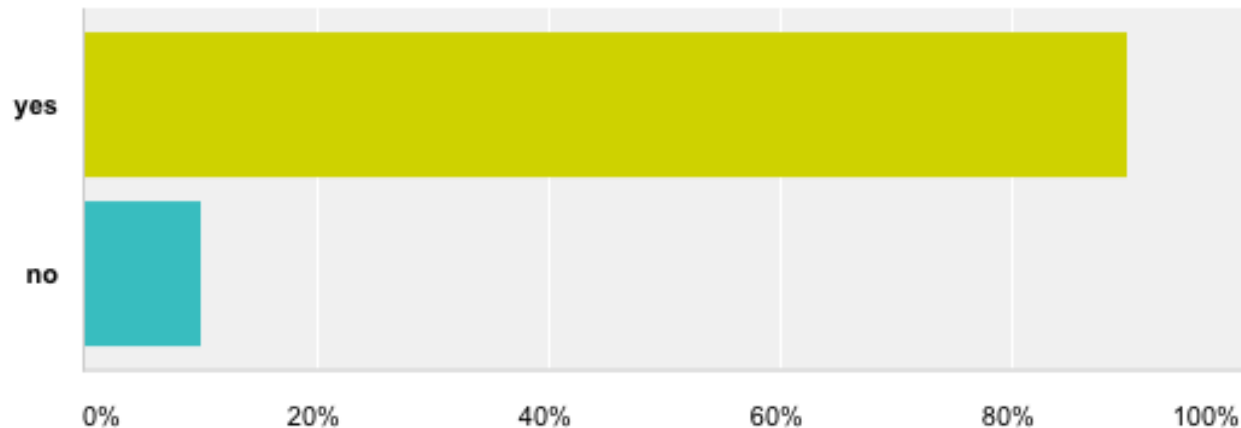
Local Craft Brewing and Beverage Tourism



The Co-Hop: A Cooperative Brewery in Oneonta

**Would you be interested in renting
time/space in a cooperative brewery where
brewing equipment (and some technical
support) is provided?**

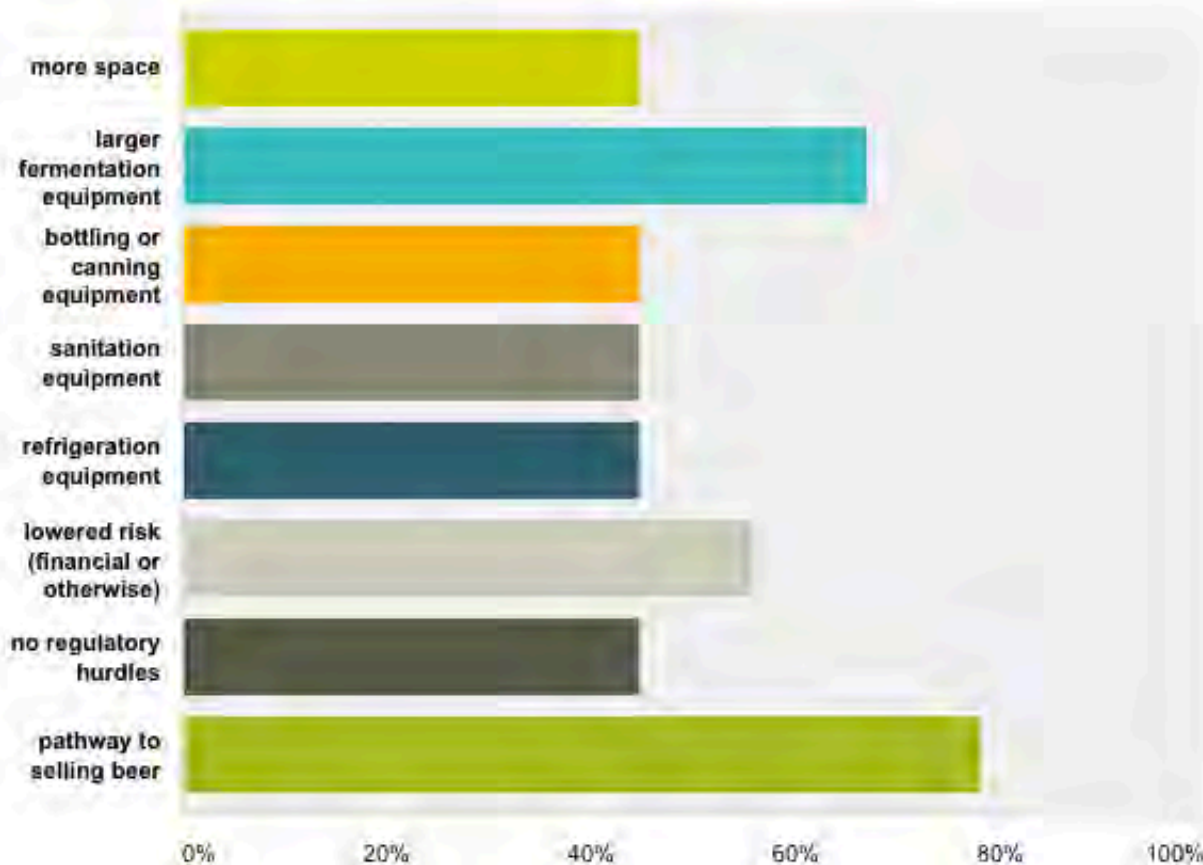
Answered: 10 Skipped: 0



The Co-Hop: A Cooperative Brewery in Oneonta

What aspects are most attractive about joining a cooperative brewery?

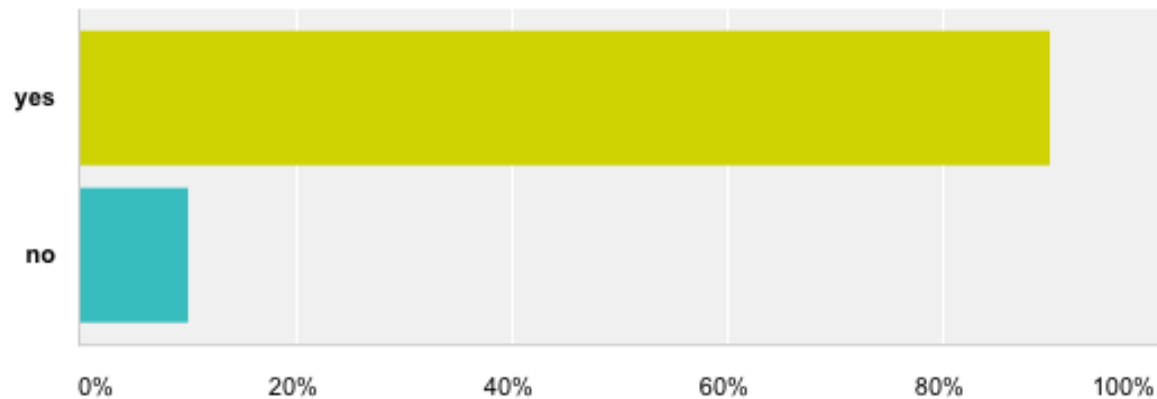
Answered: 8 | Skipped: 1



The Co-Hop: A Cooperative Brewery in Oneonta

**Do you feel there is a need for home
brewing supplier in Oneonta?**

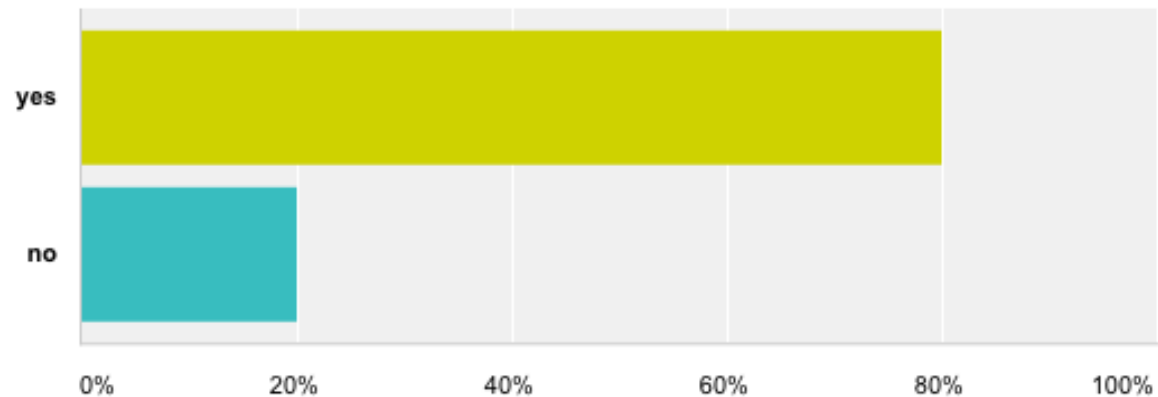
Answered: 10 Skipped: 0



The Co-Hop: A Cooperative Brewery in Oneonta

Are you ultimately interested in selling your beer?

Answered: 10 Skipped: 0



The Site

4 Acre Site
Former Fertilizer Supplier
Vacant for Several Years
Recently Listed for \$249k

2 Buildings
4k sq ft + 10k sq ft
Rail Access



First Phase: The Co-Hop in the Smaller Structure

Main Use is Cooperative Brewery

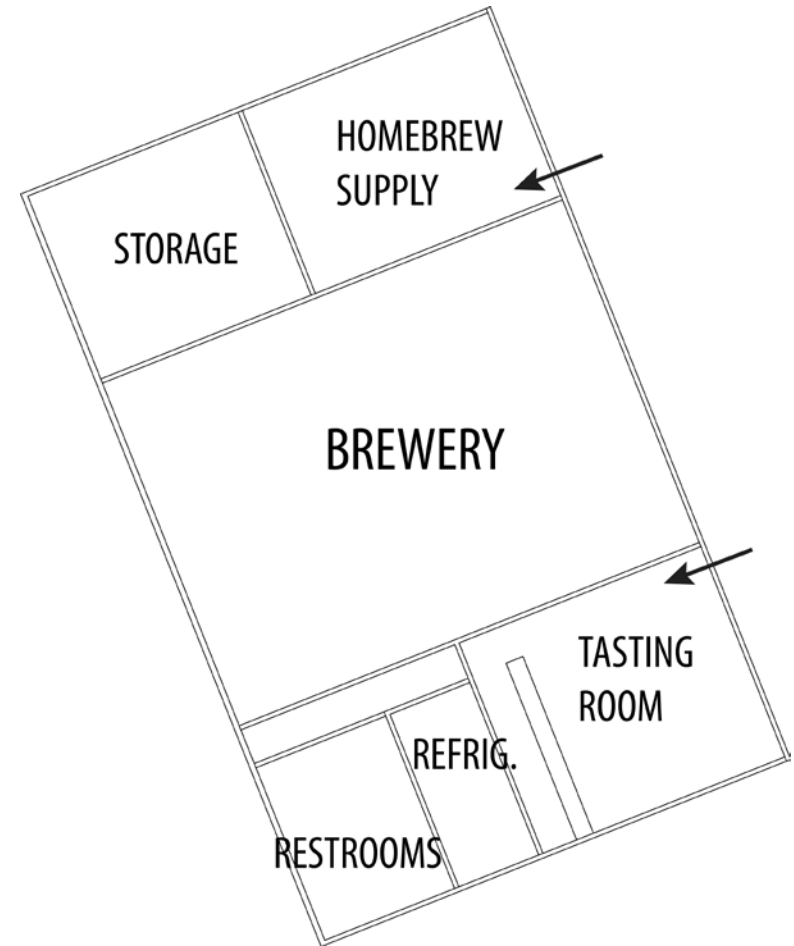
Also Includes:

Tasting Room/Refrigeration

Home Brew Supply Shop

Restrooms

Tasting Room is Dependent on Securing a
Brewery License or Courting a Farm
Brewery "Branch Office"



Next Phase: The Co-Hop Beergarden

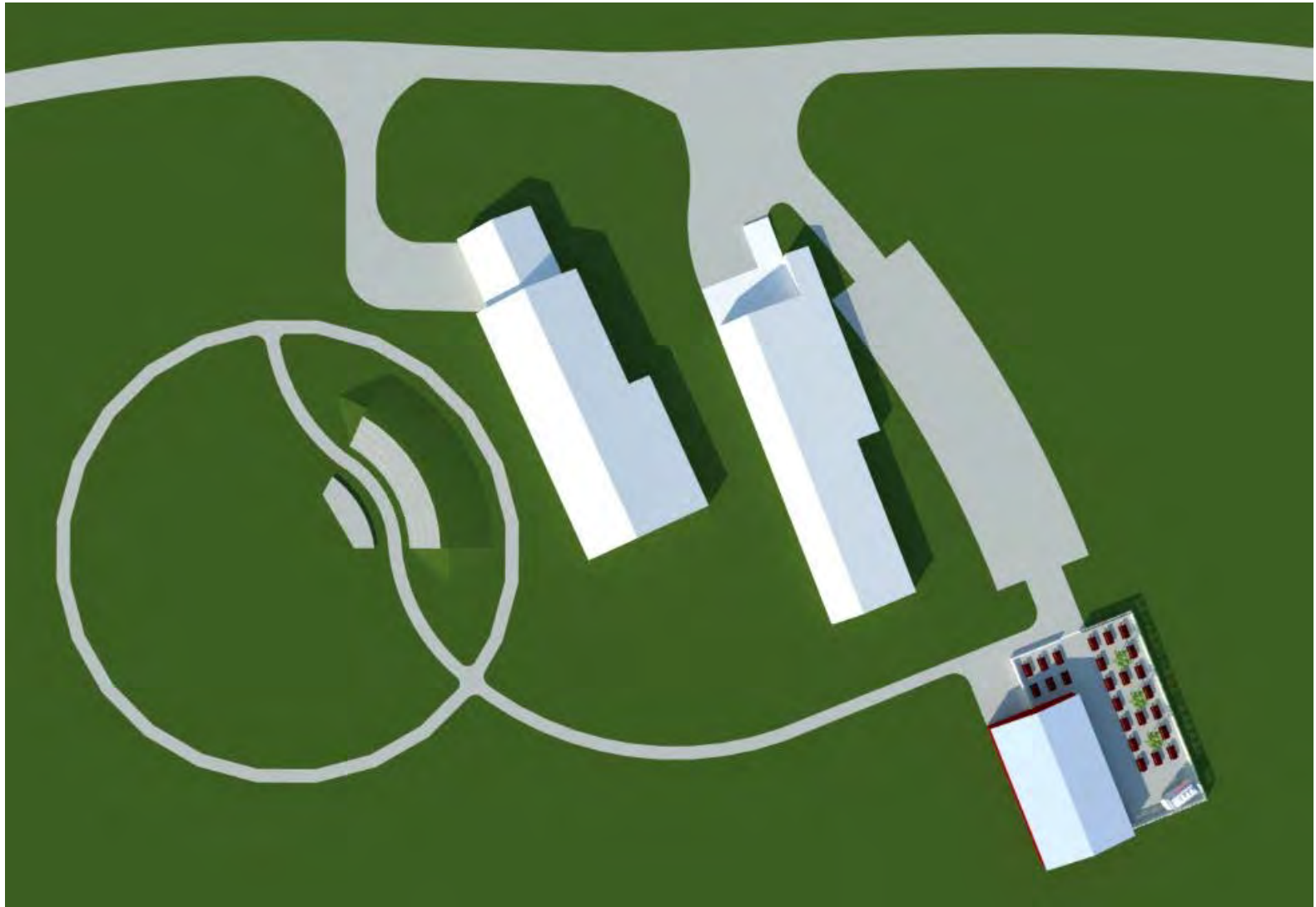
- Would Require Retail Sales Permit
- Food Served by Mobile Vendor



Next Phase: The Co-Hop Beergarden



Connecting to the Roundhouse Ruins



Redeveloping the Roundhouse: Case Study 1

Toronto, Ontario

Owned by City of Toronto

Houses Steam Whistle Brewery (2/3 of Structure)

Also Includes Rail Museum

1/3 Demolished, Then Rebuilt

Connects to Larger Park

Miniature Train Ride



Redeveloping the Roundhouse: Case Study 2

Evanston, Wyoming

Funding Support from Rocky Mountain Power

Various Historic and EPA Grants

Modular Restoration (ongoing)

\$12M in Restoration So Far

Houses City Hall

Premier Event Space



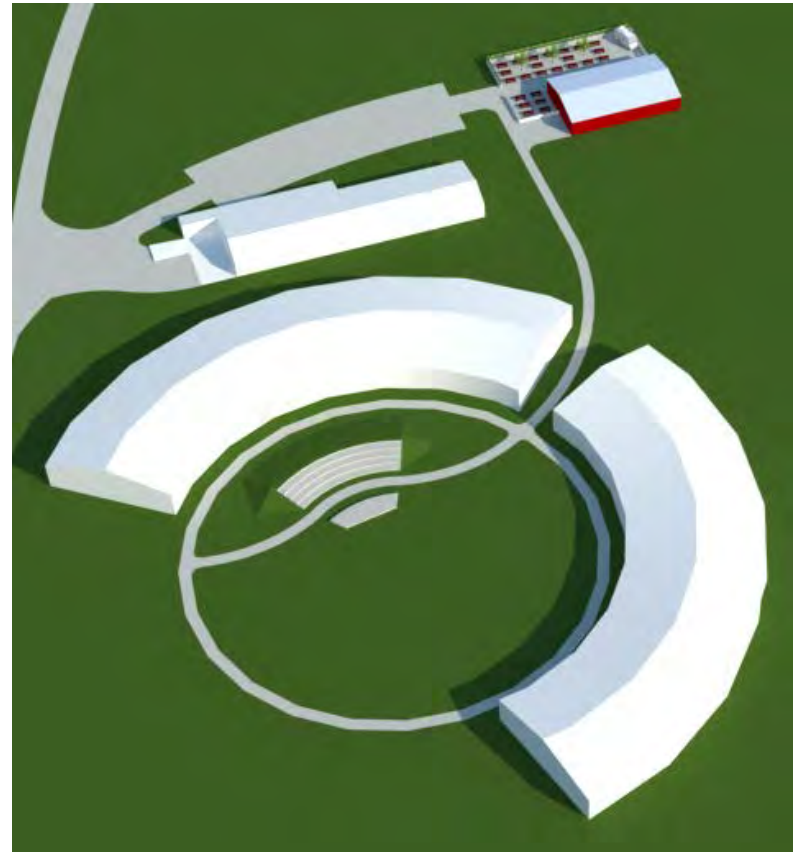
Incremental Redevelopment of Roundhouse

Capitalize on the “Legend” of the Roundhouse

Public Partnership Potential (See Above)

Unique Real Estate Product

Historical Tax Credits



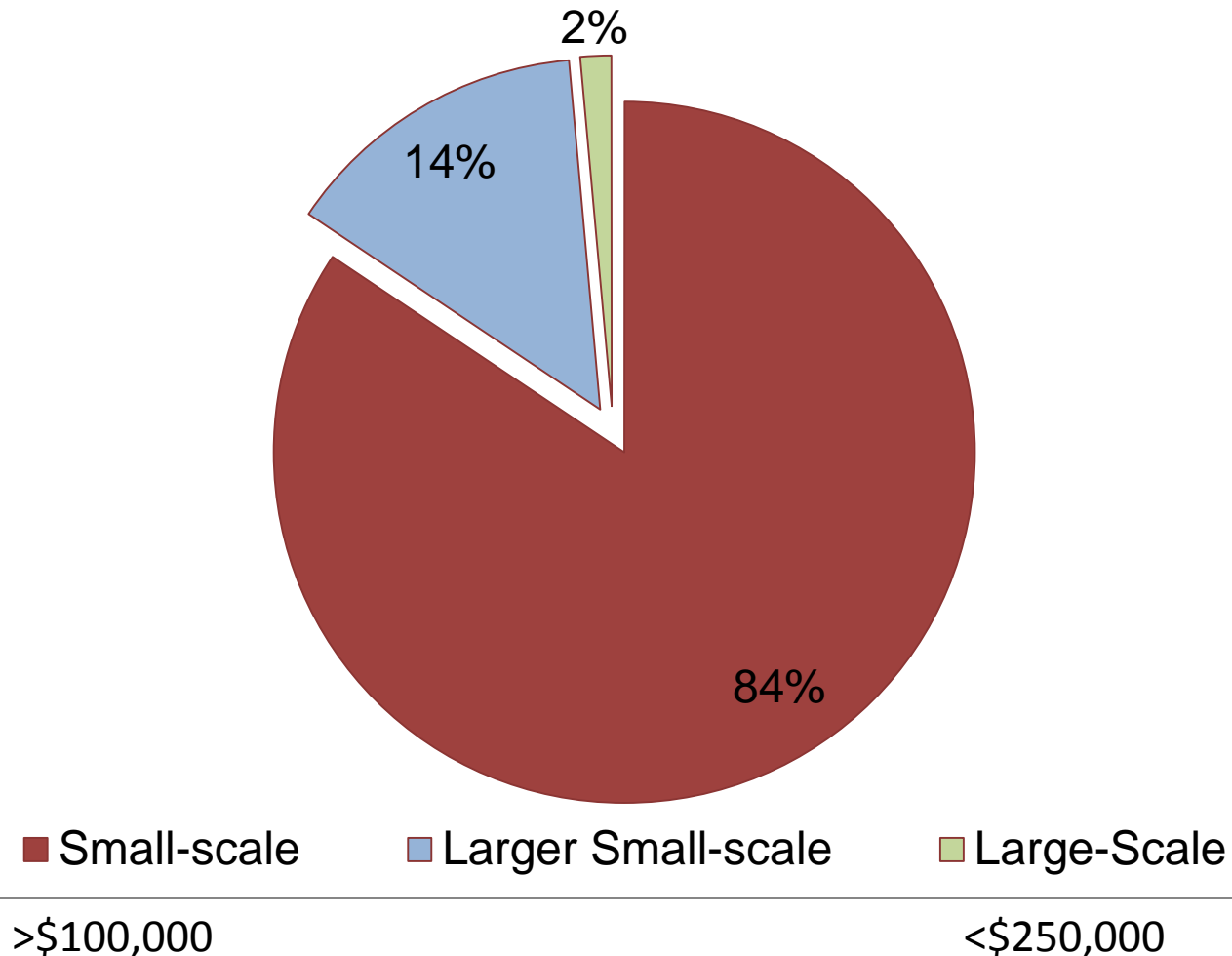
Food Hubs



Outline

- Agriculture in context to Otsego and surrounding counties
- Opportunities
- Challenges

Farm Size in Otsego County by Annual Sales



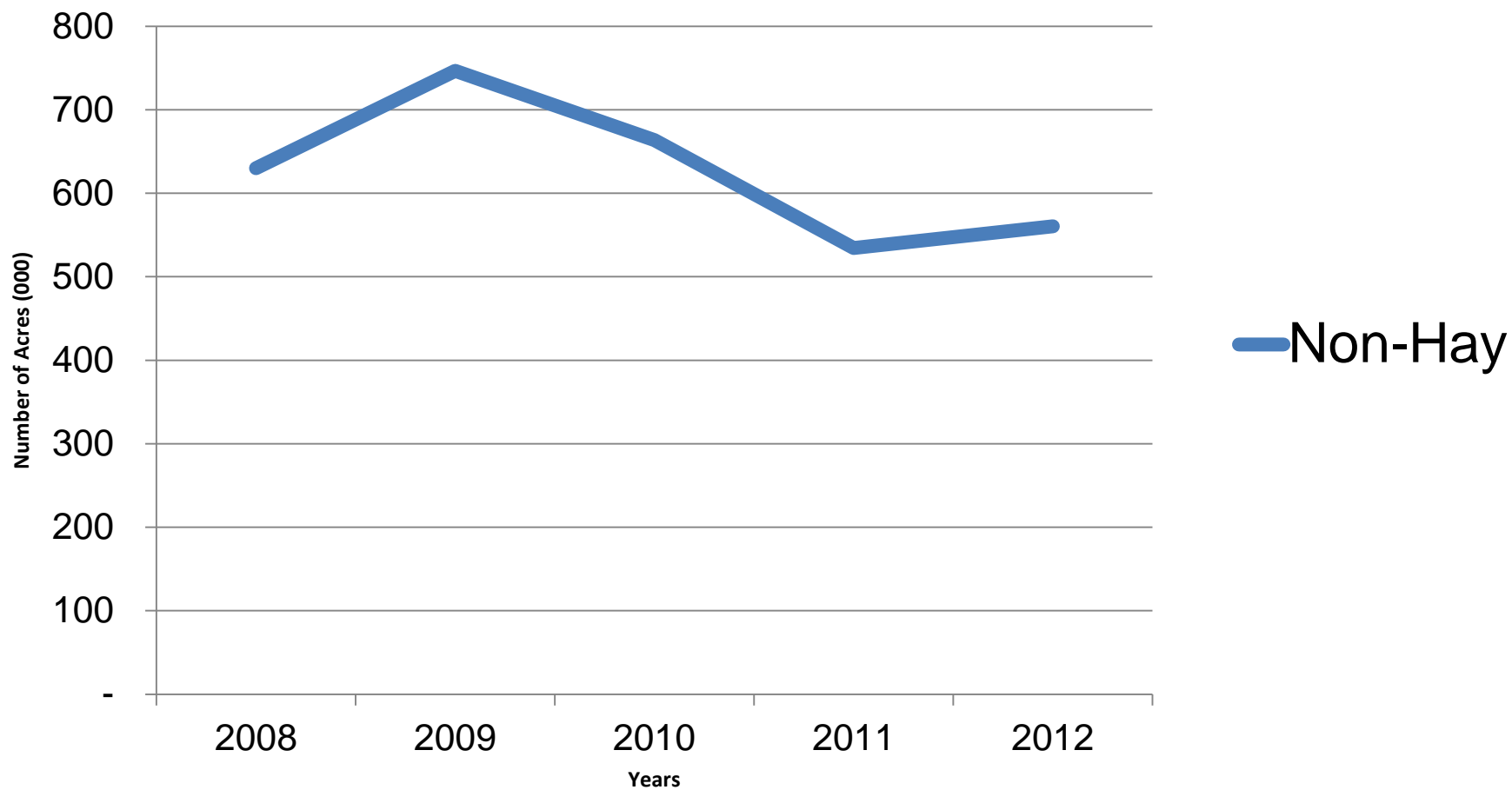
USDA 2007 Census of Agriculture

Top Agricultural Uses

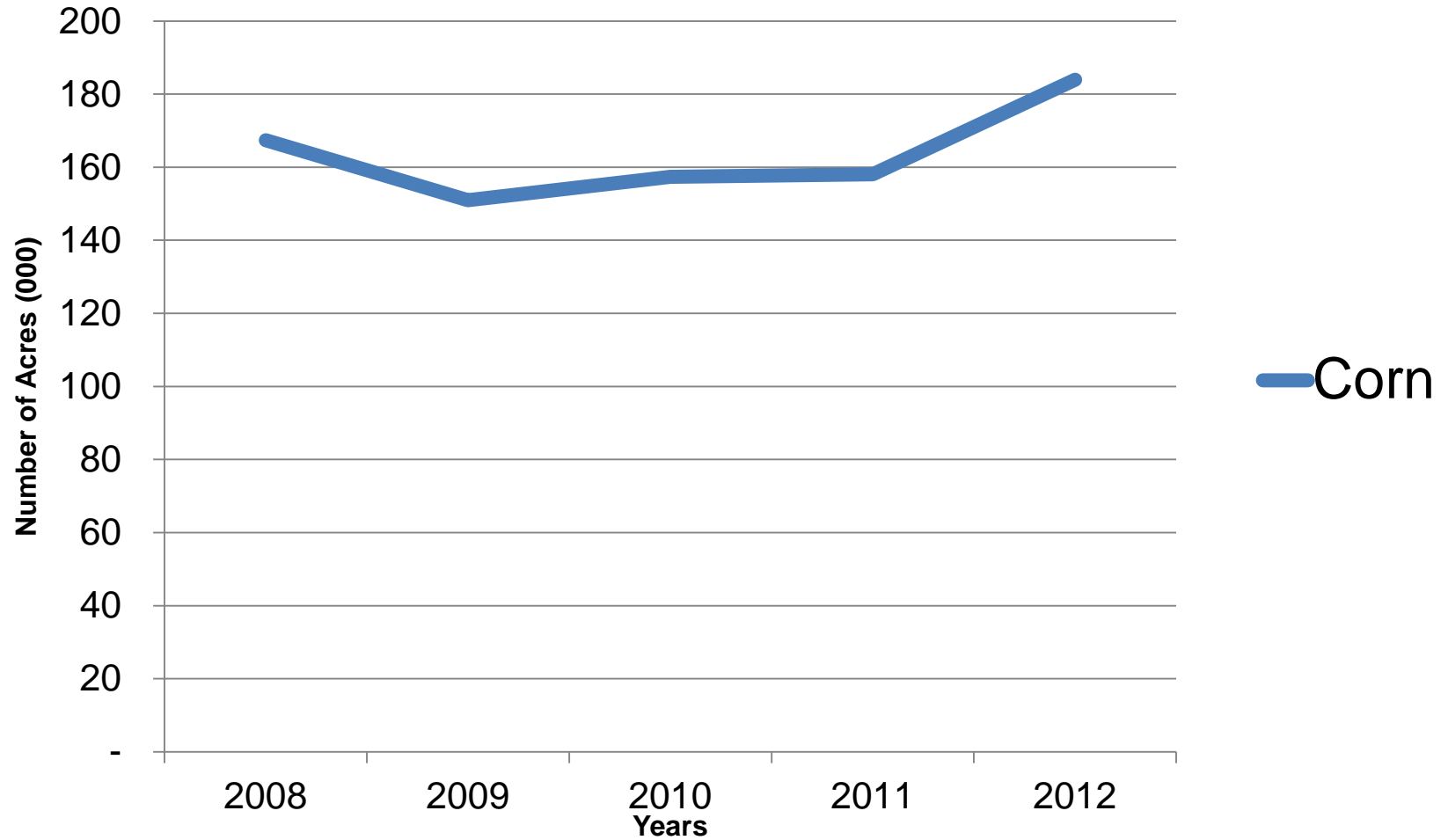
Agricultural Land Use	Acres	%
Other Hay/Non Alfalfa	560,403.8	49.8%
Pasture/Grass	238,536.2	21.2%
Corn	183,942.2	16.3%
Alfalfa	64,736.5	5.8%
Fallow/Idle Cropland	50,780.8	4.5%
Soybeans	12,771.9	1.1%

Source: USDA NASS Cropscape Data Layer

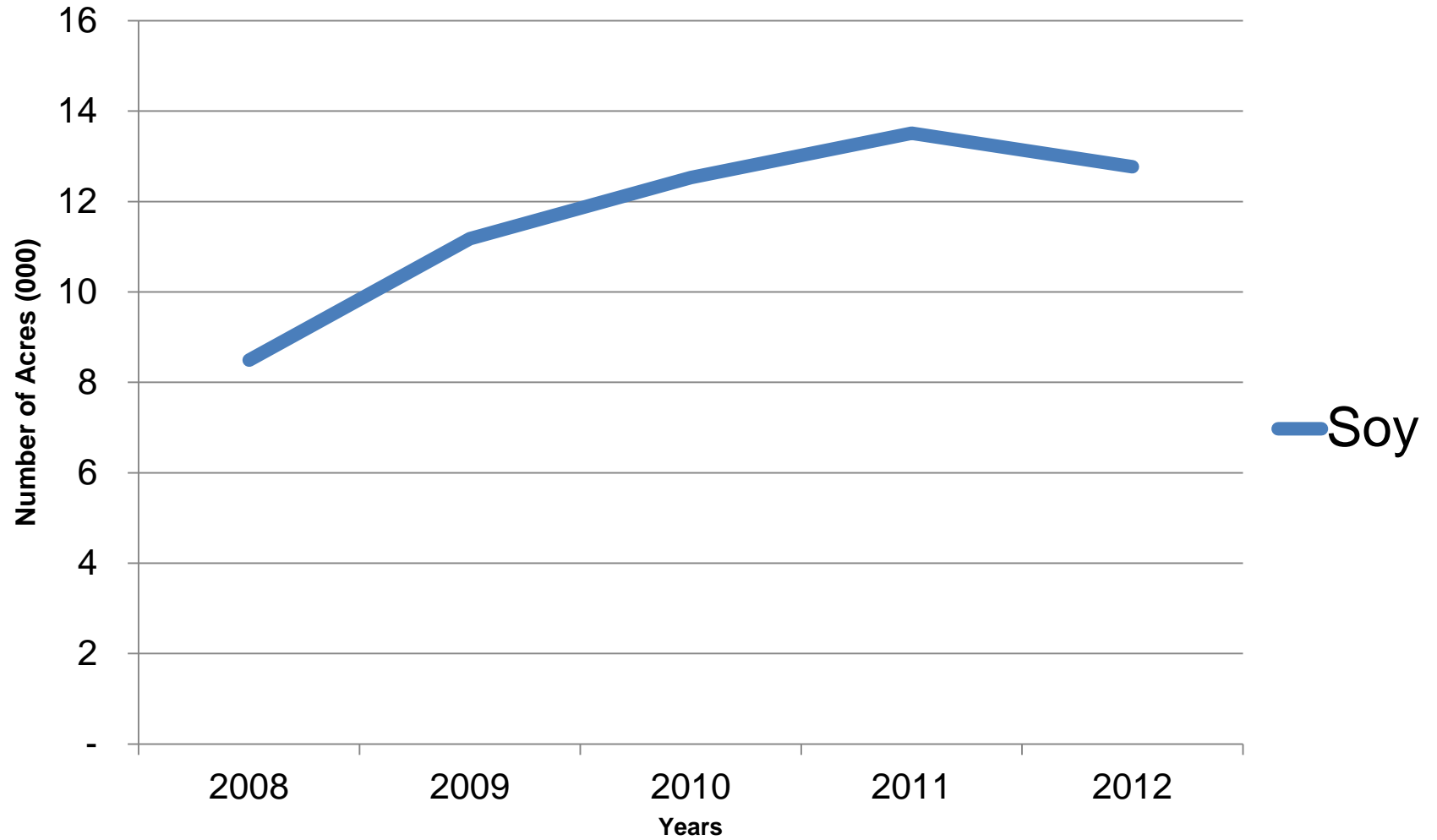
Other Hay Trend



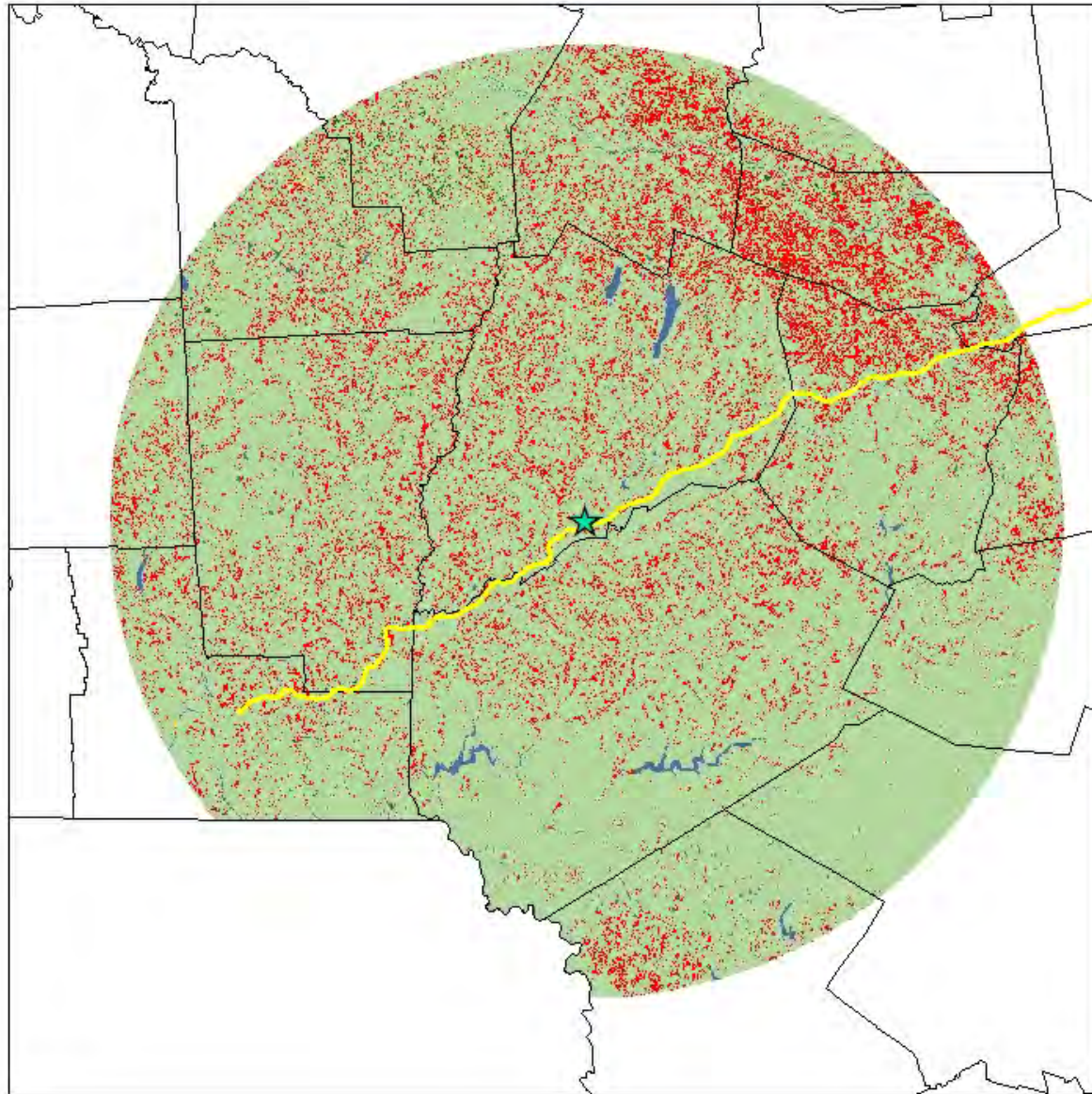
Corn Trend



Soy Trend

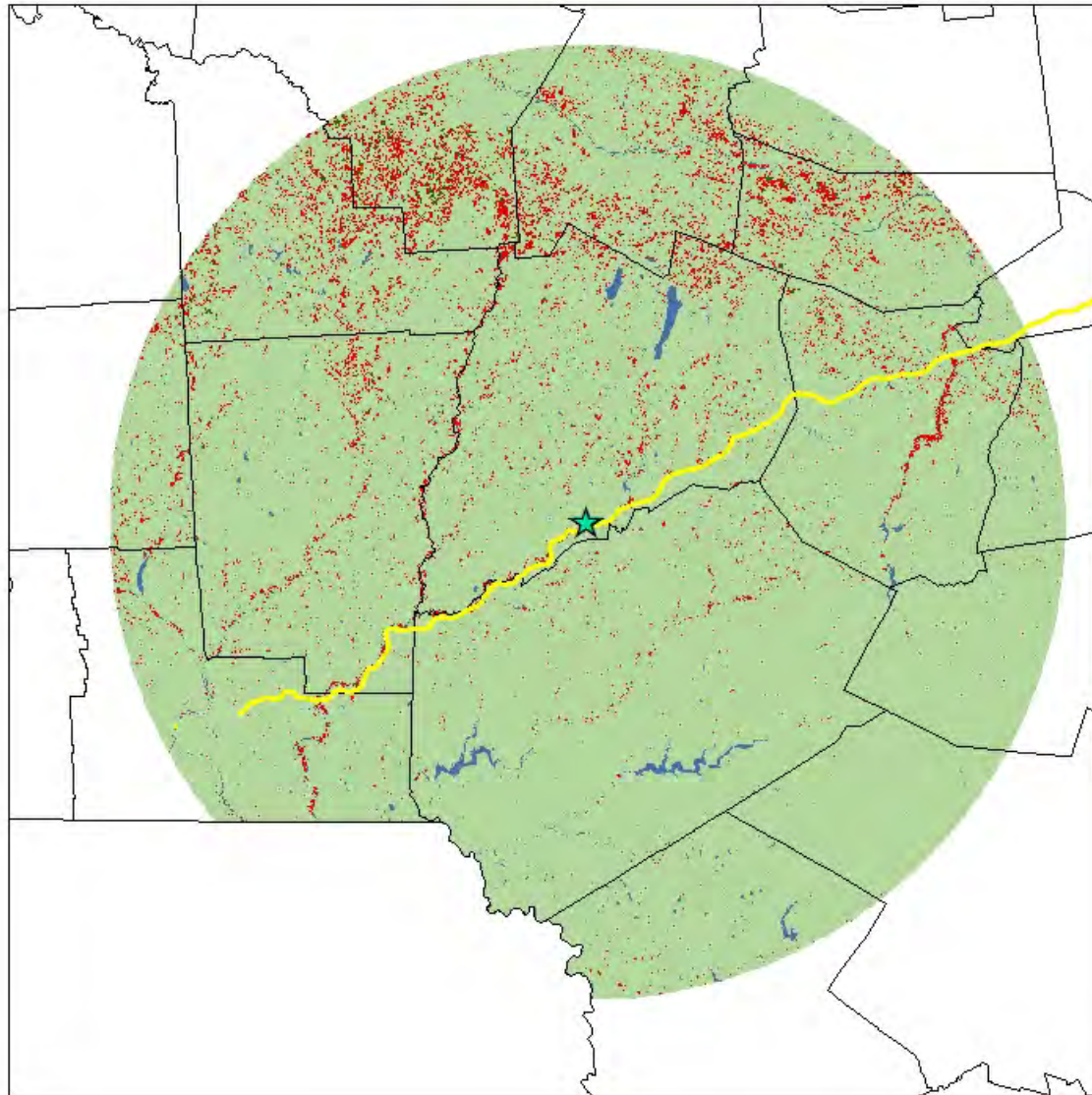


Land Dedicated to Hay Production



Source: USDA NASS Cropscape Data Layer 2012
<http://nassgeodata.gmu.edu/CropScape/>

Land Dedicated to Corn Production



Source: USDA NASS Cropscape Data Layer 2012
<http://nassgeodata.gmu.edu/CropScape/>

Livestock in Oneonta and Surrounding

County and District	All Cattle and Calves	Milk Cows	Beef Cows
Otsego	24,000	11,100	2,300
Chenango	37,000	10,300	3,800
Delaware	29,000	13,700	2,900
Herkimer	28,500	18,600	2,200
Madison	42,000	13,600	1,600
Montgomery	30,000	13,200	1,600
Oneida	33,000	5,900	1,700
Schoharie	14,000	16,700	1,900
NYS TOTAL	1,410,000	610,000	100,000
%	16.8%	16.9%	18.0%

New York office of USDA's NASS 2012 Estimate

Livestock in Oneonta and Surrounding

County and District	Hogs	Sheep
Otsego	782	2,134
Delaware	657	1,201
Chenago	878	1,200
Madison	274	1,684
Herkimer	306	1,832
Montgomery	102	2,339
Schoharie	291	1,305
Oneida	723	1,302
NYS TOTAL	85,741	63,182
% of Total	4.7%	20.6%

USDA 2007 Agriculture Census

Opportunities



- Connection to I-88
- Proximity to Albany and Binghamton
- Livestock

Challenges

- Majority of Small Farmers in Otsego
- Limited Market in Oneonta
- Cost of a Facility (seasonal vs. annual)

Opportunities for Funding (USDA Rural Development)

- Community Facilities Grants & Loans
- Business & Industry Guaranteed Loan Programs
- Rural Business Enterprise Grant (RBEG)
- Rural Economic Development Loan and Grant Program (REDLG)
- Community Food Projects Competitive Grant Program

Intermodal Transportation

Local, Regional, and Interstate
Connection

Transportation Analysis

Outline

- Transportation Context & Identification of Needs
- Comparison Site & Establishment of Goals
- Incremental Plan for Intermodal Facility
- Impacts (Economic, Environment, etc.)

Transportation Context:

Connectivity disadvantages

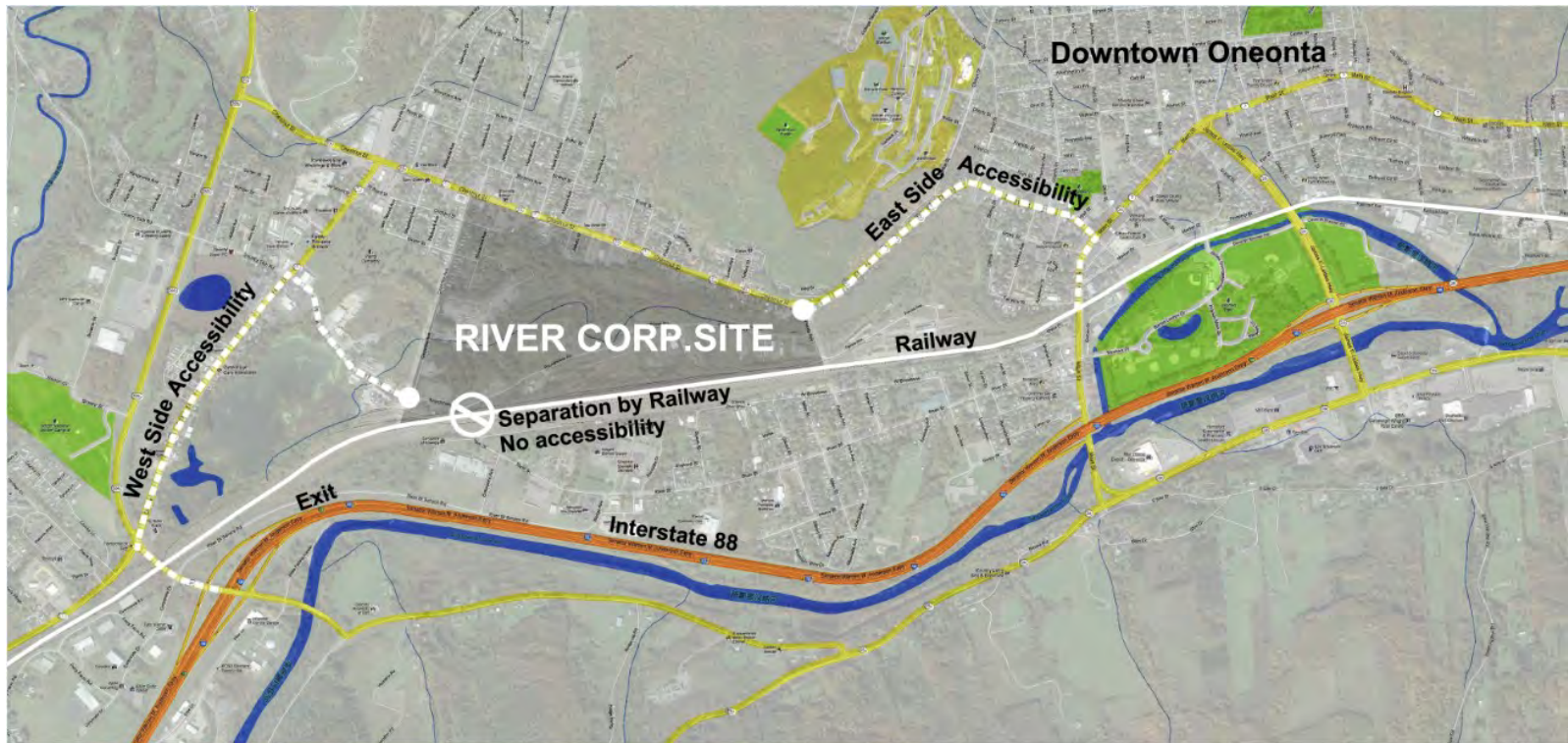


Railway

- 8 trains pass through daily, serving one local business
- Unreliable service is due to inadequate demand
- No paved roads to the railroad sidings

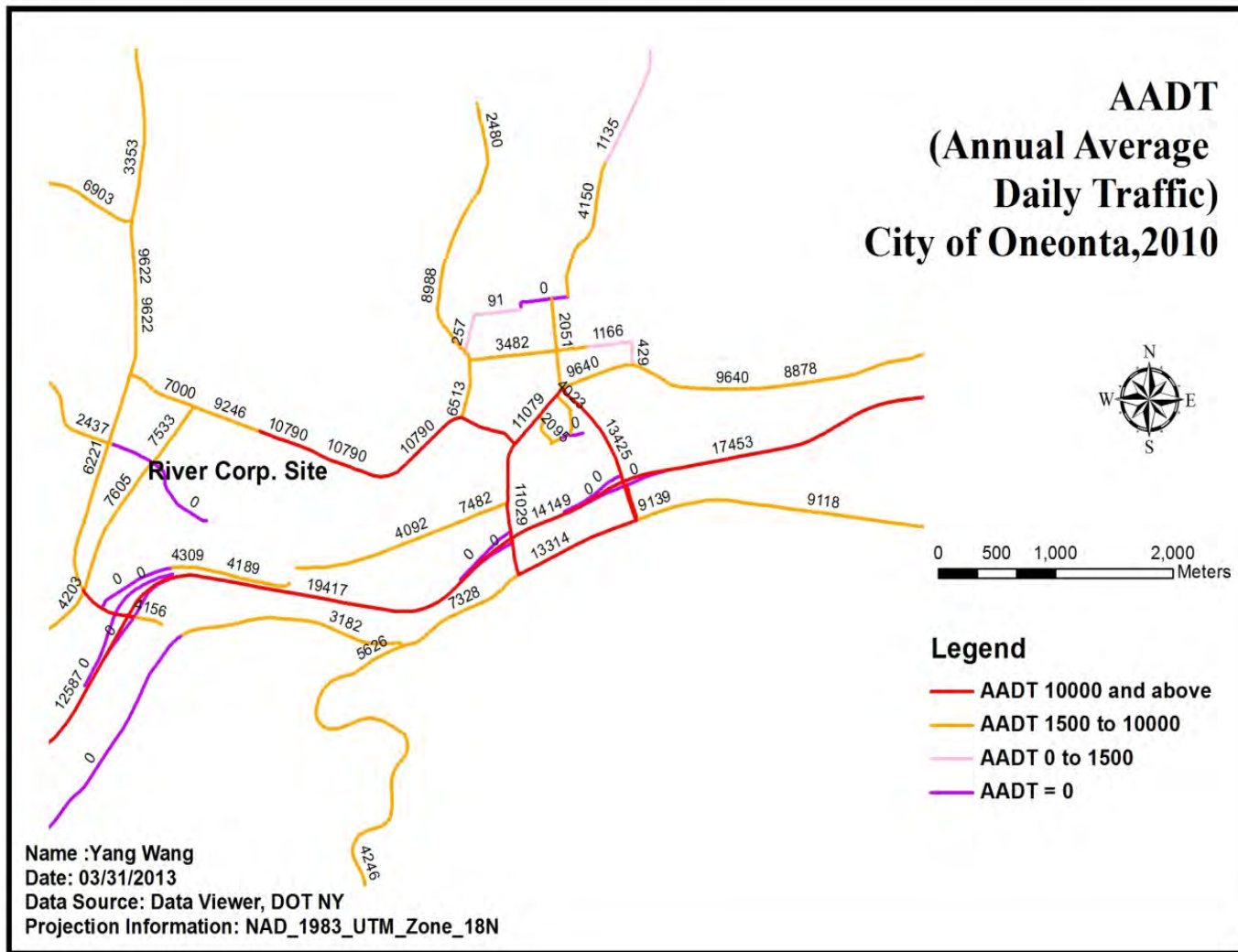
Transportation Context:

Connectivity disadvantages

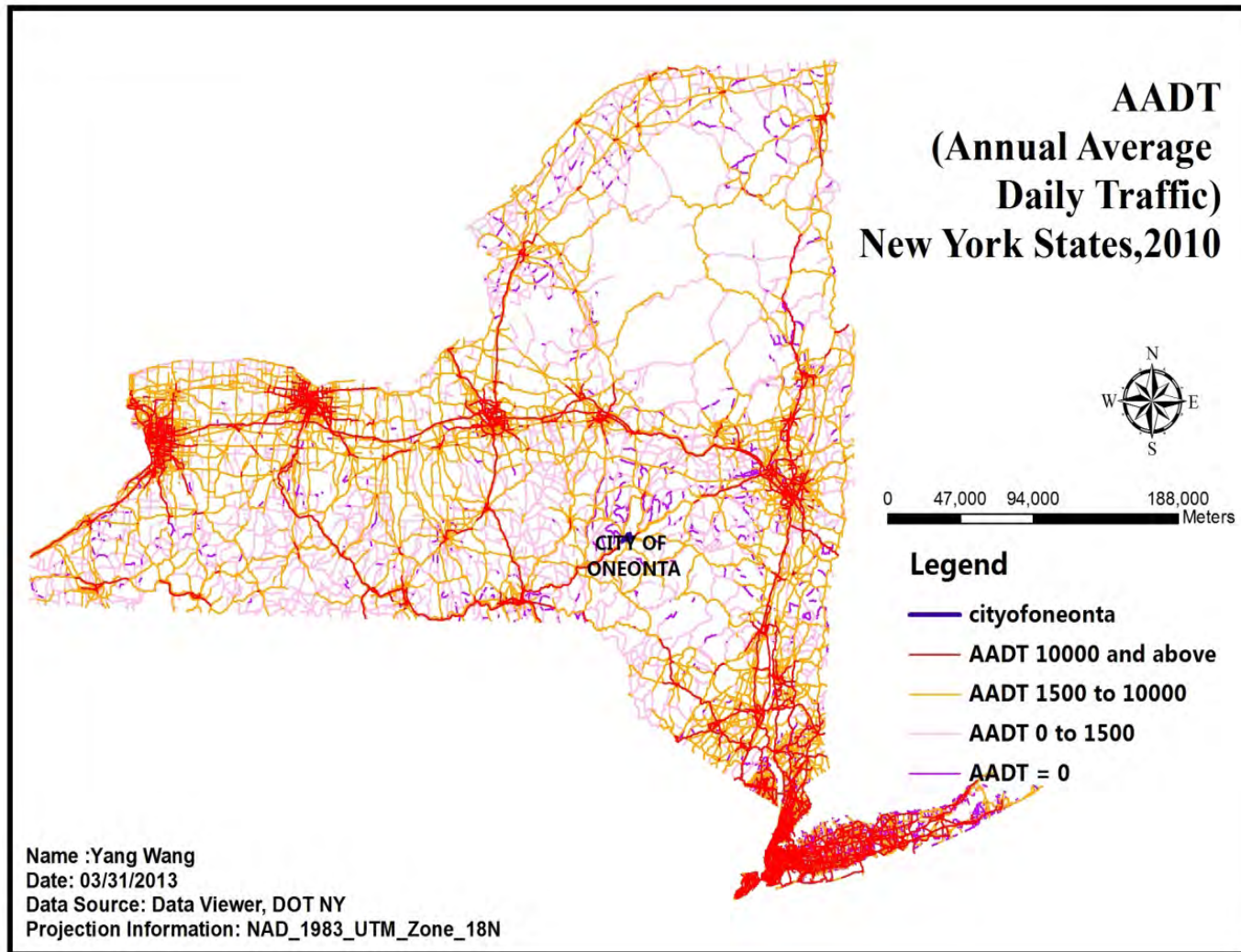


Highway

- Site is located in close proximity to the interstate
- Low accessibility from the site to the interstate



Poor attraction of economic investments is a result of low accessibility



Poor attraction of economic investments is a result of low accessibility

Locational disadvantages:

Wetlands:



- Inability to build infrastructure upon wetlands

Identification of Needs:

CURRENT NEEDS:

Lutz Feed Company:

- Only local business using the railway system
- Uses the rail service every 6 days to transport raw materials
- Sends out 6 trucks per day to deliver final product

Corning, Inc:

- Major employer near the site, on the south side of the tracks
- May contribute to demand for rail use

FUTURE NEEDS:

- **Brewery** – transport hops and barley
- **Food Hub** – inbound and outbound transportation of other food products

Comparison Site

Murphy Warehouse Company

905 Yankee Doodle Road, Eagan, Minnesota



Range of products:

- Forest: paper, pulp, building materials, panel board
- Food and Beverage: salt, beer, canned goods, sugar

Capacity:

- Remove, install and transport heavy equipment through rigging, millwright, equipment & heavy haul service.
- Light assembly work
- Promotional product distribution and product sampling
- Just-in-time production support
- Short-term public warehouse space during expansions, renovations and new construction

Establishment of Goals:

➤ **Goal 1:**

Pave the Roundhouse Road

➤ **Goal 2:**

Attract demand for the railway system

Increase the priority in the railway system

Access reliability of the railway system

➤ **Goal 3:**

Connect the highway to the site and the railway

Enhance site attraction

Design for Intermodal Facility

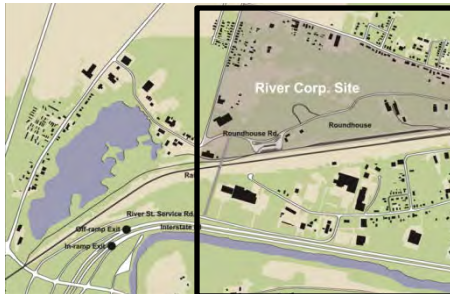


Design for Intermodal Facility

Phase I

Situation:

- Pave the Roundhouse Road segment from Fonda Ave. to Ceperley Ave.
- Reserve ample space for building up the new bridge

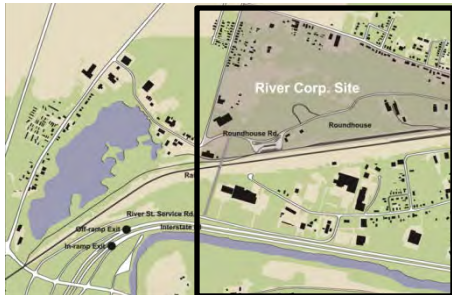


Design for Intermodal Facility

Phase II

Situation:

- Construct the intermodal terminal at the southern edge of the site



Phase II Detail:

BUILD THE INTERMODAL TERMINAL

Parking area

- Platform adjacent to rail track is designed for receiving goods from either dumpers or containers

Small size slope

- Allows the forklifts convenient access

Segmented rail track

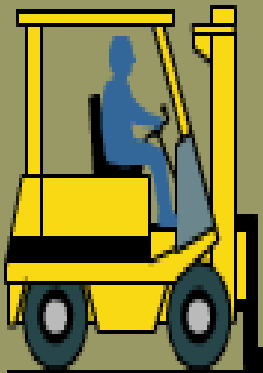
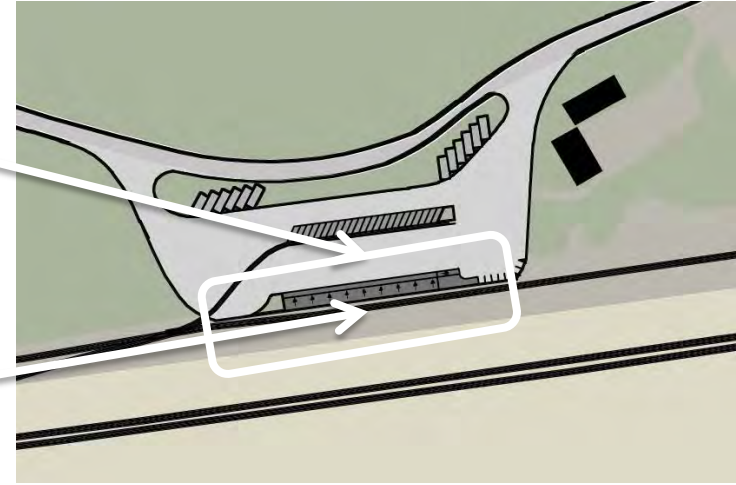
- Temporary train car storage



Phase II Detail: Forklift and Slope operation section view:

North Side, to get goods directly to trucks

South Side, to get goods off the trains



North Side

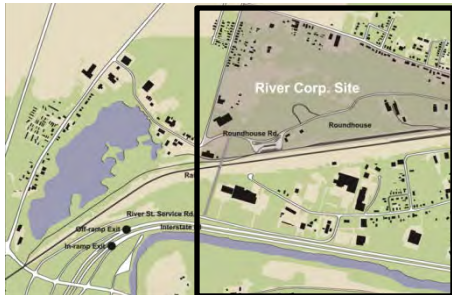
South Side

Design for Intermodal Facility

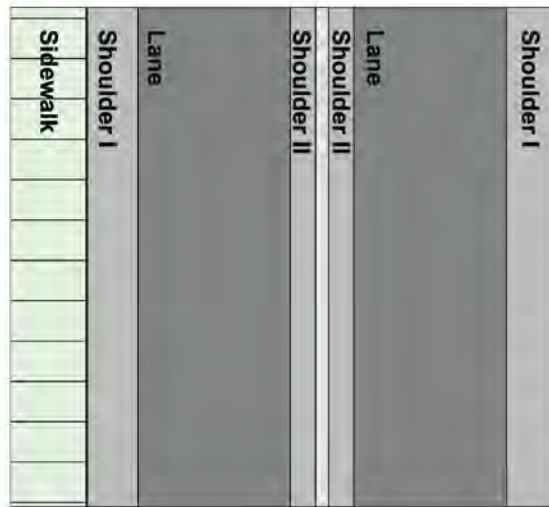
Phase III:

Situation:

- Construct a bridge connecting the Roundhouse Rd. to the River St. Service Rd.



Impact of Intermodal-Transportation Bridge:



Lane : 12 feet
Shoulder I : 4-8 feet
Shoulder II: 2 feet
Barrier Wall: 1 foot
Sidewalk: 6-8 feet

Design of the bridge:

- Two lanes in total
- Approximately 43' to 53' (13 m to 16.15 m)
- 1' to 2' barrier wall to divide the two lanes
- 6' to 8' sidewalks to the west side of the bridge.



Design for Intermodal Facility

Phase Overview:

	Phase I	Phase II	Phase III
Construction	Pave the Roundhouse Rd.	Construct the new Intermodal Terminal	Construct the new bridge connecting Roundhouse Rd. to River St. Service Rd.
Suitability	--Minimize cost --Basic step to increase accessibility	Build up the connection between rail system and on-road transportation & make the site more appealing for goods transfer & distribution	--Complete accessibility --Allow pedestrian & bike flows --Relatively higher cost

Impact of Intermodal-Transportation

Possible Fund Sources:

Name	Overview
Industrial Access Program (IAP)	The New York State IAP has been designed to complement economic development projects throughout the State where transportation access poses a problem or may offer a unique opportunity to the viability of a project
Statewide Transportation Improvement Program for Federal Fiscal Years 2011 - 2014	The Statewide Transportation Improvement Program (STIP) is a list of all projects, or project phases, in New York State proposed for Federal funding, that are scheduled to begin in the four federal fiscal years (FFY) 2011 - 2014 (between October 1, 2010 and September 30, 2014).

Source: Grants and funding, DOT, NYS

Impact of Intermodal-Transportation

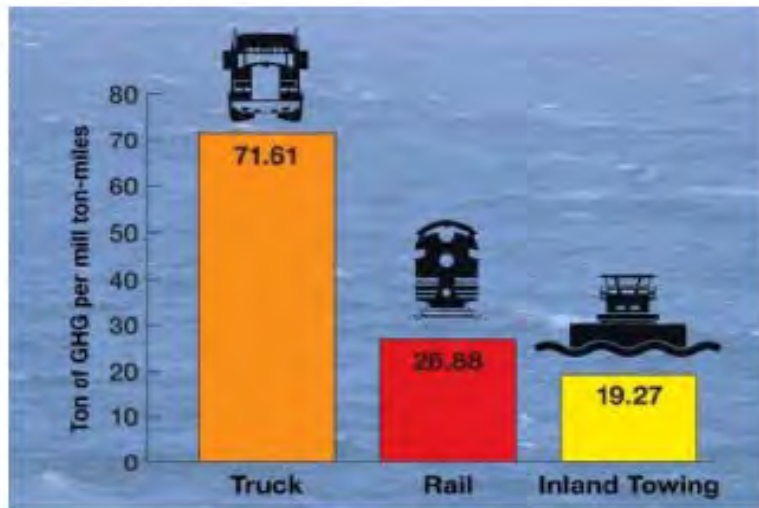
Economic Comparison:

- Increasing the cost-efficiency
 - Rail fuel efficiency :156 ton-miles/gallon
 - Truck fuel efficiency:68-133 ton-miles/gallon
 - On average, shipping 100,000 tons of goods via railway saves **\$2,800/mile** over trucking

Impact of Intermodal-Transportation

Environmental Influence:

- Reducing the amount of average carbon dioxide emission



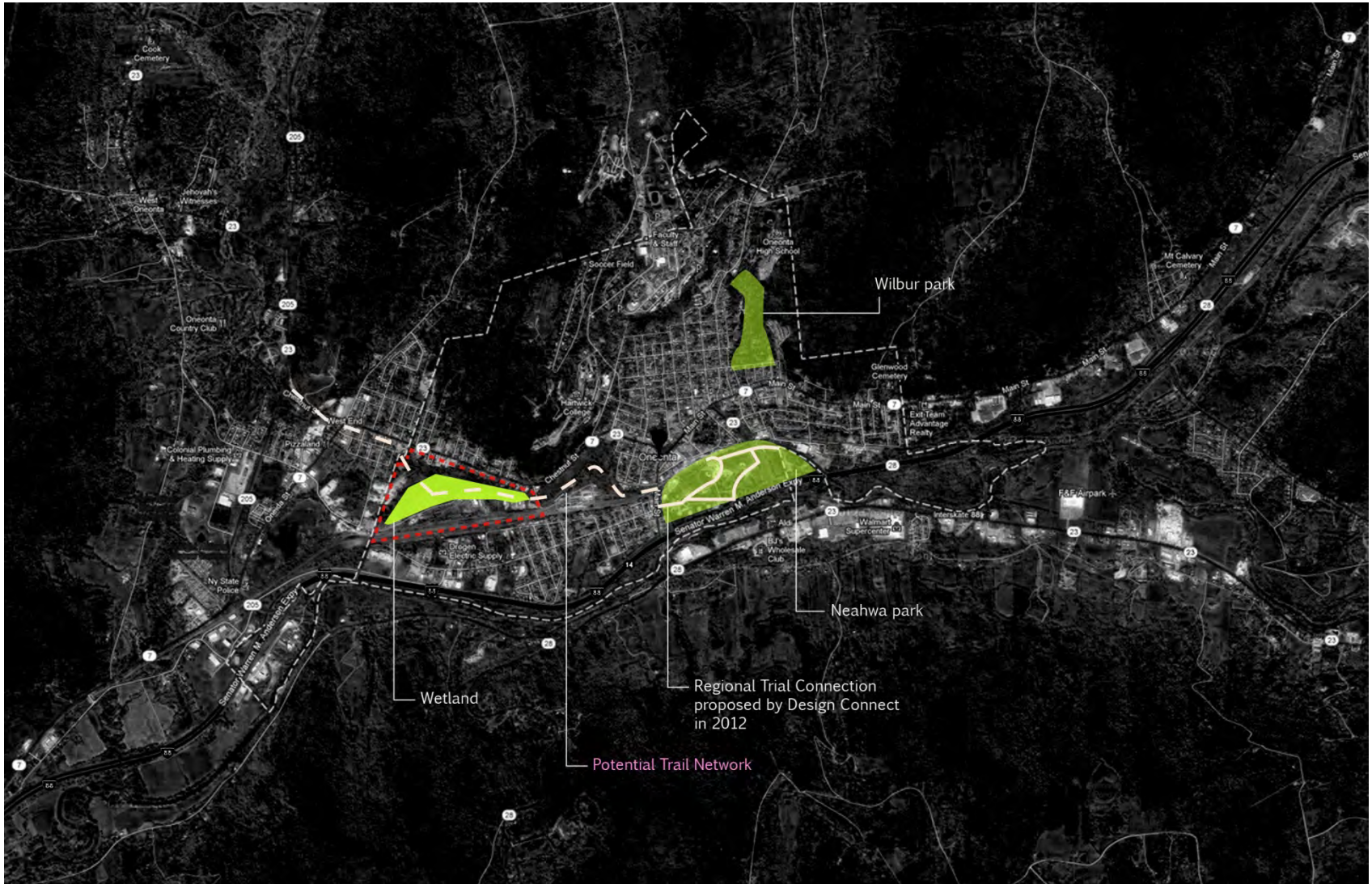
- Moving freight by rail, rather than trucking, lowers green house gas emissions by 75%

Figure 14. From Texas Transportation Institute report (page 36)²⁰.

Wetlands Boardwalk

Making Oneonta Walkable

East-West Connection



Walkable Areas Follow Wetlands



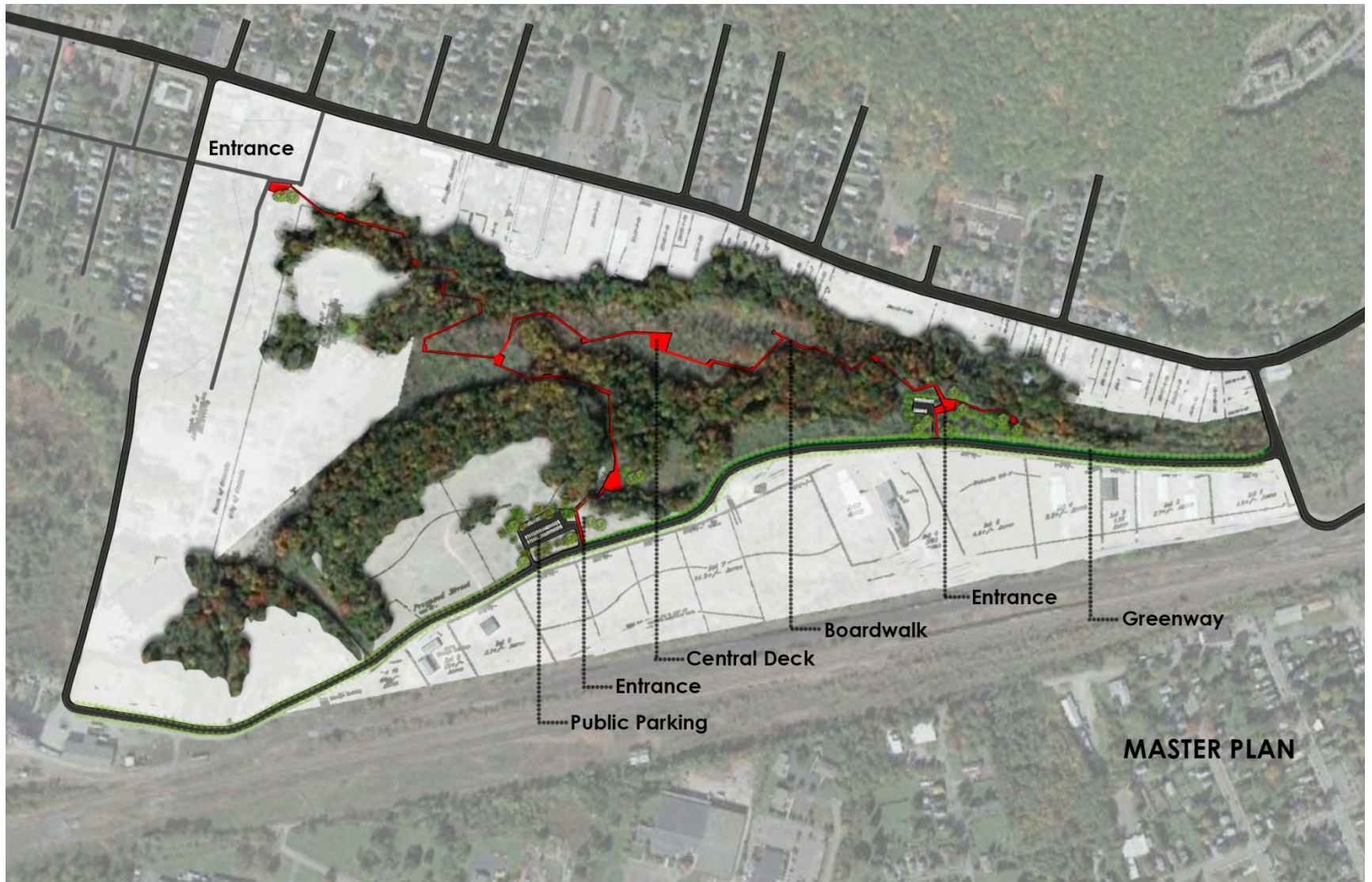
Tree Canopy Establishes Nodes



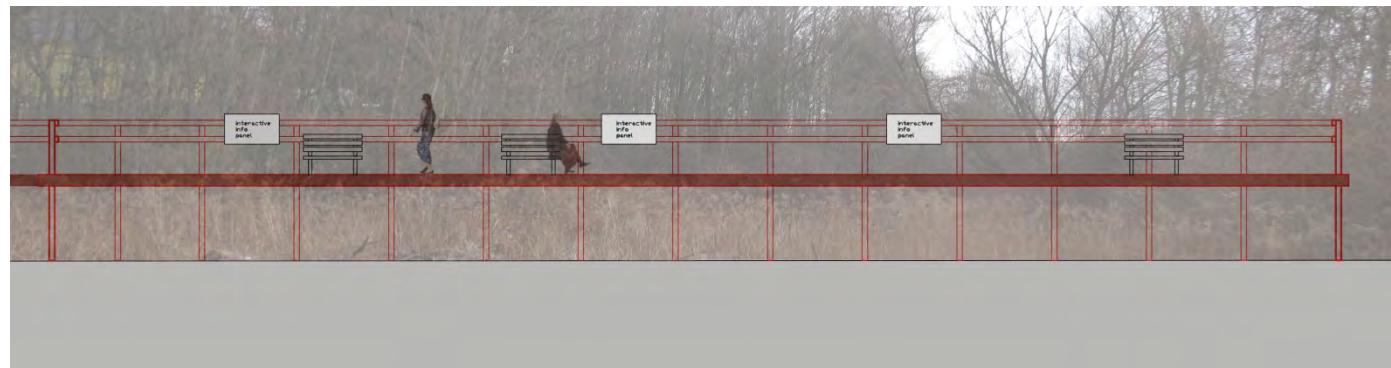
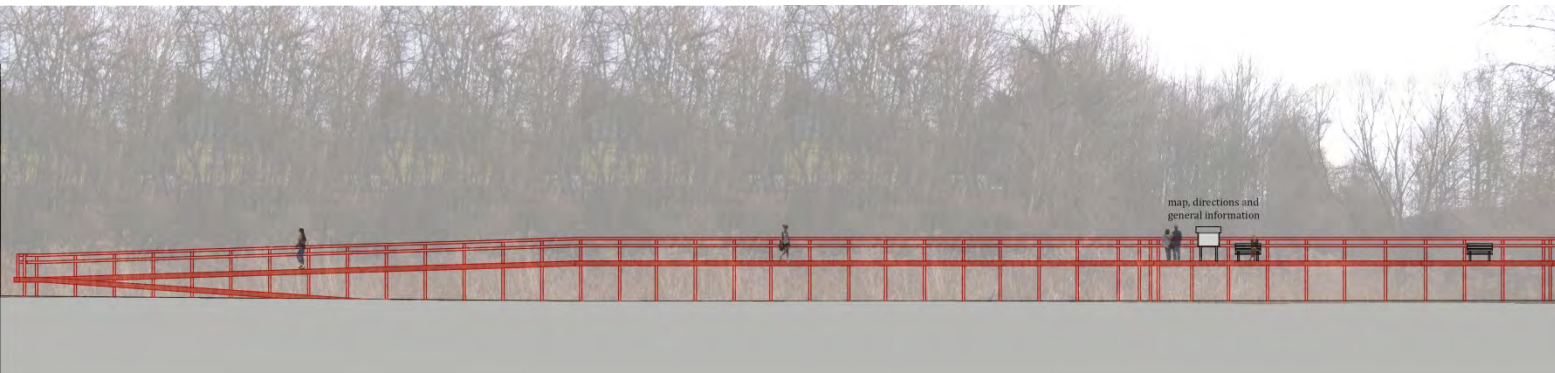
Trail Linkage



Master Landscape Plan



Section Views



Enhancement of Roadside Walkability



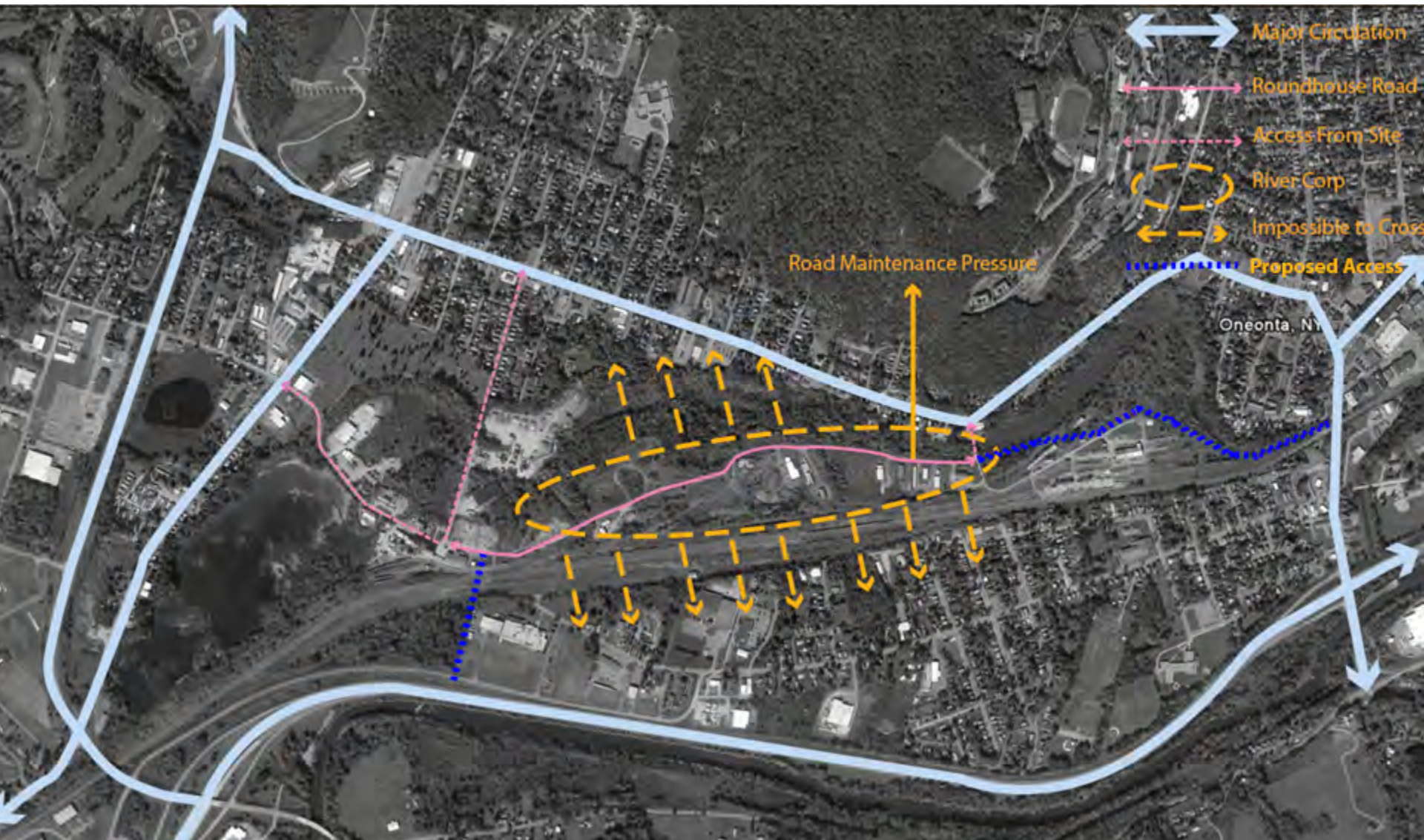
Parcel Acquisition

Connection to Downtown

Connection to Highway

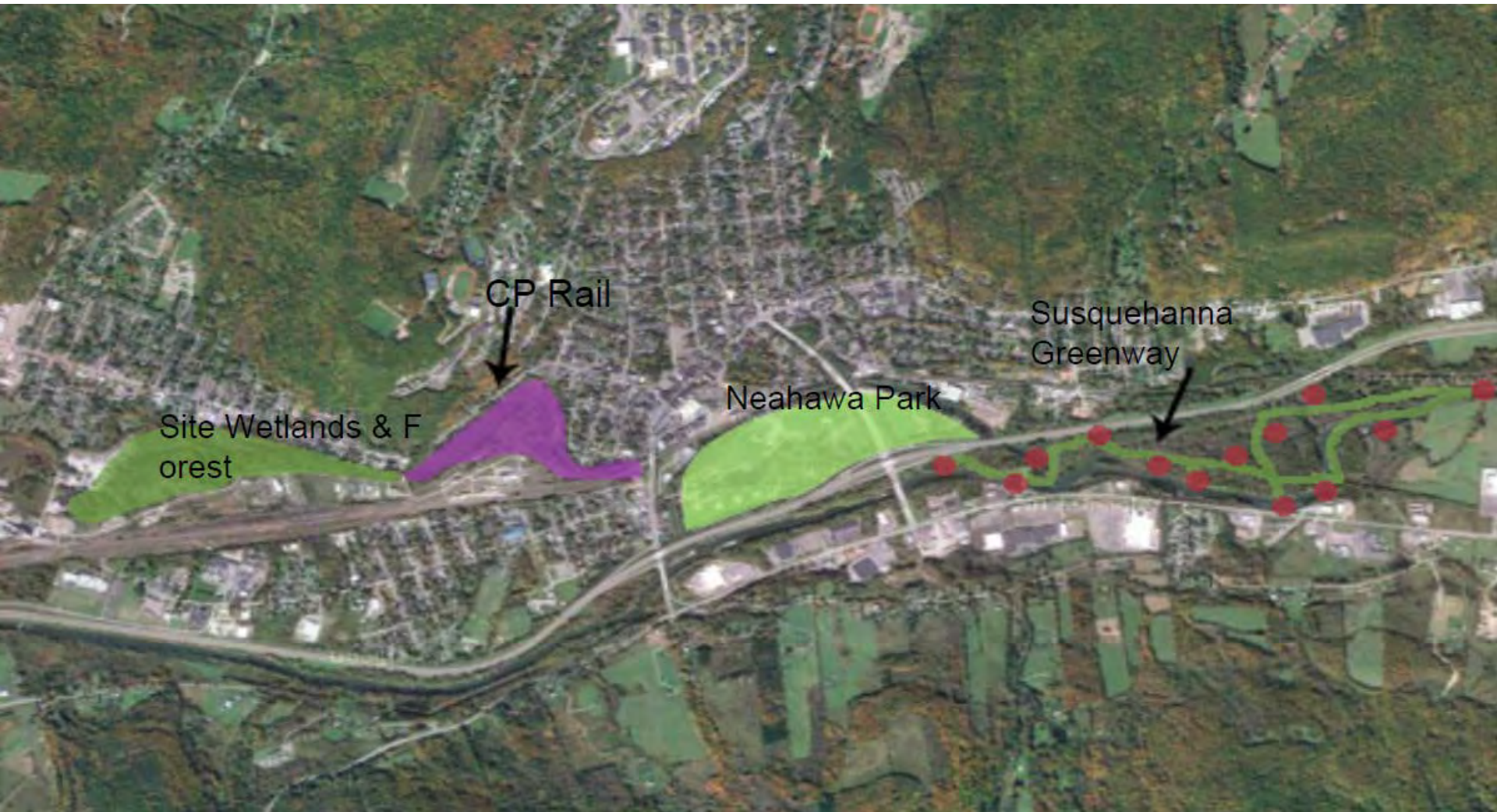
Parcels

Current Weakness: Lack of Access



Parcels

Current Weakness: Lack of Access



Parcels

Connection to Downtown



Parcels

Connection to Downtown

11-13 Fairview St



MBL : 300.9-1-13
Primary Owner : City of Oneonta
Acres : 0.07
Class : Res vac land

Main St



MBL : 300.9-1-15
Primary Owner : City of Oneonta
Acres : 0.07
Class : Res vac land

15 Fairview St



MBL : 300.9-1-12
Primary Owner : City of Oneonta
Acres : 0.17
Class : Res vac land

5-7 Fairview St

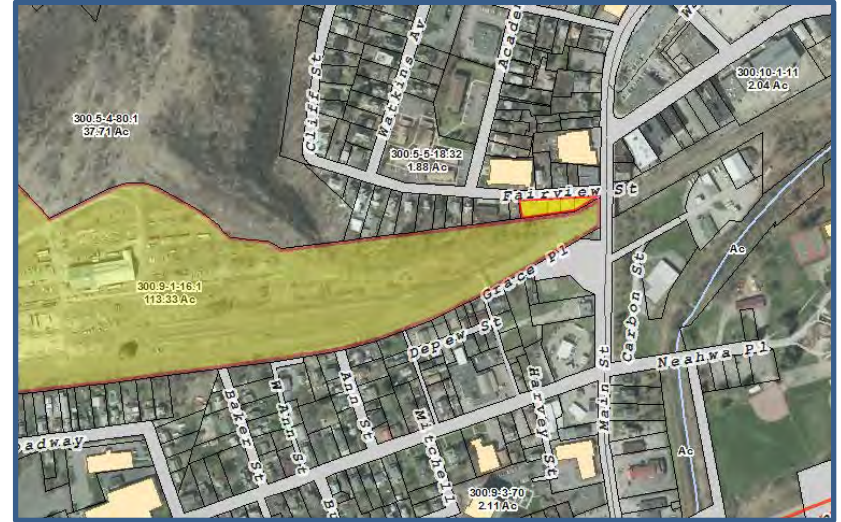


MBL : 300.9-1-14
Primary Owner : City of Oneonta
Acres : 0.07
Class : Res vac land

Acquisition

City

- **Step 1: Define Physical Boundaries**
- **Step 2: Appraisal (survey, evaluation and environmental review)**
- **Step 3: Acquisition Options:**
 - City Owned Properties:
 - 15 Fairview parking lot
 - 11-13 Fairview property
 - 5-7 Fairview property
 - Fairview - Main corner property
 - CPRail Property:
 - Donation
 - Lease
 - Easement / Right of Way Acquisition
 - Direct Purchase
 - Eminent Domain





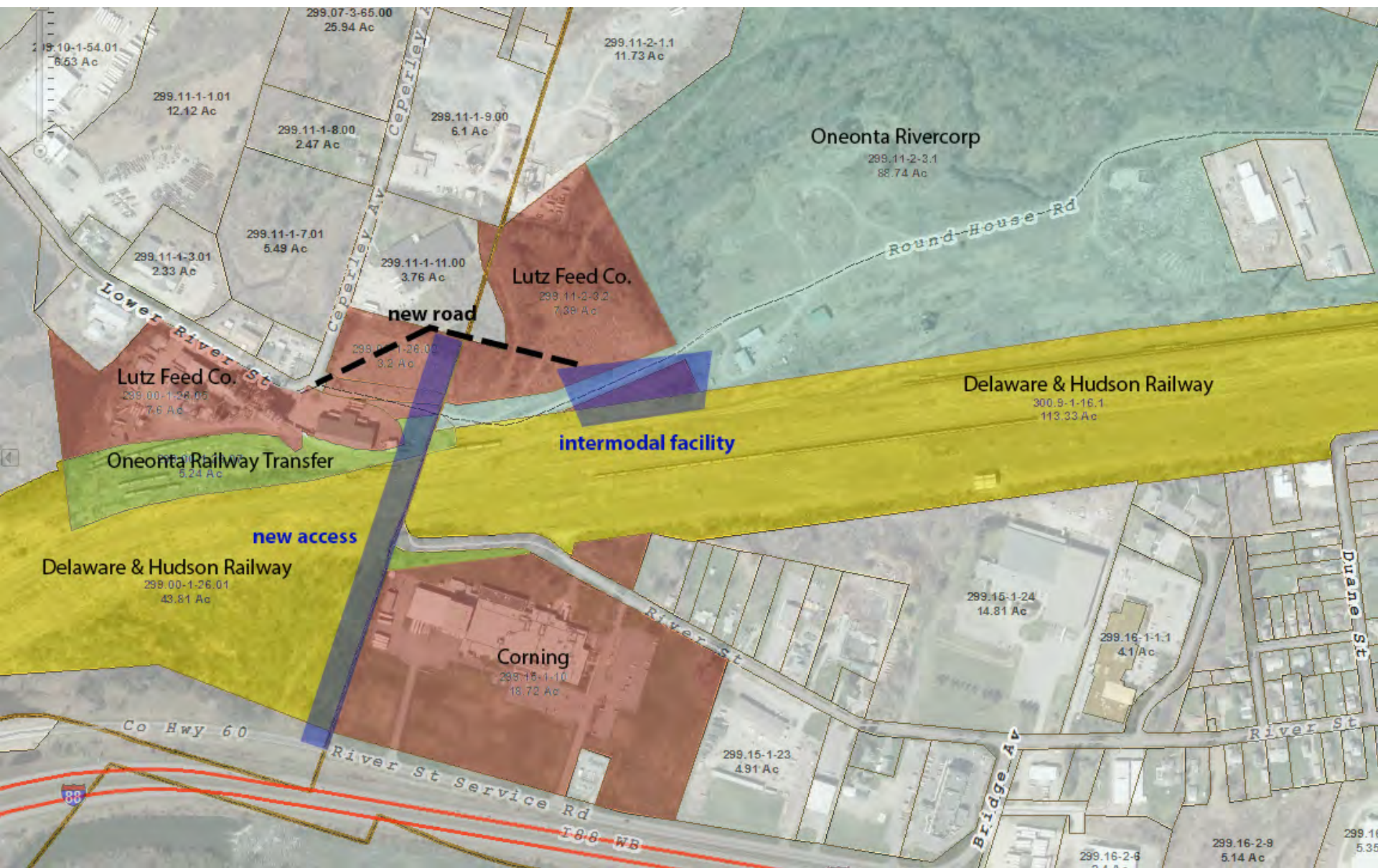
Parcels

Connection to Highway



Parcels

Connection to Highway



Parcels

Connection to Highway



Acquisition

City, Town and County

- **Step 1: Apply for DOT funds**
- **Step 2: Appraisal (survey, evaluation, environmental and public review)**
- **Step 3: Acquisition Options:**
 - CPRail Property:
 - Donation
 - Lease
 - Easement / Right of Way Acquisition
 - Direct Purchase
 - Eminent Domain
 - Lutz Feed Property:
 - Donation
 - Lease
 - Easement / Right of Way Acquisition
 - Direct Purchase
 - River Corp Property:
 - Direct Purchase / Donation

