

Appendix D-2
Economic Considerations

I-81 Viaduct Project

Supplemental Economic Analysis for the Community Grid Alternative

A. INTRODUCTION

In consideration of public comments received after the publication of the preliminary Draft Design Report/Draft Environmental Impact Statement (DDR/DEIS) in April 2019, this technical memorandum presents the assessment of potential effects of the Community Grid Alternative on the local and regional economies. The analysis considers the potential for induced growth and economic benefits as well as the potential for indirect (or secondary) business displacement due to changes in vehicular travel patterns and potential resulting changes in consumer behavior. It assesses how induced growth and potential indirect business displacement may affect economic and fiscal conditions, and whether such economic and fiscal changes could have beneficial and/or adverse environmental effects.

B. STUDY AREAS

This analysis considers three regional study areas: the City of Syracuse, Onondaga County, and the 5-County Region (Onondaga County, Oswego County, Cayuga County, Cortland County, and Madison County).

Local study areas within Onondaga County have been established to assess locations where changes in traffic conditions could substantively affect local market conditions and/or business operations, either positively or negatively. These study areas include the Central Study Area, I-481 South Study Area, I-481 East Study Area, and I-481 North Study Area (see **Figure 1**), which are described in the DDR/DEIS. These study areas were expanded to include key destinations and locations that could experience increases or decreases in consumer base due to changes in travel time and traffic volumes. The analysis considered properties along roadways, interstate interchanges, and specific business districts where changes in traffic patterns could alter market conditions by increasing or decreasing access and potential consumer base.

C. DATA SOURCES AND METHODOLOGY

United States (U.S.) Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7 data were evaluated to provide an overview of general economic conditions in each of the above study areas. LODES, a dataset from the U.S. Census, describes geographic patterns of jobs, using employment locations, residential locations of workers, and the connections between the two locations. LODES Version 7 includes data for 2002-2018, Quarter 2 (April – June), which is the reference period in each year.

Labor force data were obtained from the U.S. Census 2000 and the American Community Survey (ACS) 2015-2019. Unemployment data were obtained from the New York State Department of Labor (NYSDOL).

Zoning and land use information was obtained from the respective municipalities. Sources include ReZone Syracuse, Village of Liverpool Zoning Code and map, Town of Salina Zoning Code and map, Town of Cicero Zoning Code and map, and Town of DeWitt Zoning Code and map.

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Annual average daily traffic (AADT); Institute of Traffic Engineers (ITE) Trip Generation Handbook, 2nd Edition; the Syracuse Metropolitan Transportation Council (SMTC) Regional Travel Demand Model; and StreetLight data were used to understand exiting travel patterns and project the anticipated changes in travel times and traffic volumes within the expanded study areas.

The expanded study areas shown in **Figure 1** were identified based on changes in travel time and/or traffic volumes, which could lead to increases or decreases in businesses' consumer base. The land use and zoning in these study areas were characterized based on field surveys and local zoning regulations. Data from Esri's ArcGIS Business Analyst were utilized to gather a list of businesses within the study areas, and field surveys performed in October 2019 verified and supplemented the Esri business data.¹ Years 2013-2019 hotel trend data for the Syracuse Metropolitan Area and Salina/Liverpool, NY (I-81 Interchange 25) were obtained from STR, Inc.² Retail sales estimates are based on data from ArcGIS Business Analyst as well as International Council of Shopping Centers (ICSC) research.³ Onondaga County hotel visitor statistics were obtained from *Visit Syracuse, Onondaga County, New York, Travel Market Research*, prepared for Visit Syracuse by Young Strategies, Inc., dated November 2015 (the "Visit Syracuse Report").⁴

Study areas that could see new growth include areas where consumer access would be improved, business visibility would increase, and/or consumer volumes would increase under the Community Grid Alternative. These generally include the areas in the immediate vicinity of the Community Grid Alternative improvements, as well as interchanges along the proposed I-81 (existing I-481). For these locations, the types and scale of growth were projected based on the expected changes in market conditions and local zoning and land use trends.

Indirect business displacement is the involuntary displacement of businesses that results from a change in economic conditions created by a project. Not all businesses are vulnerable to indirect displacement as a result of changes in traffic patterns; the potential effects on any individual business are dependent upon the specific characteristics of the business, as well as the scale of change within a business' consumer trade area.⁵ Specific to the Community Grid Alternative, the types of business identified as warranting assessment are:

- Businesses dependent upon specific types and/or volumes of consumer traffic, such as those dependent upon pass-by traffic;⁶
- Businesses sensitive to drive-time changes, changes in the volume of local consumer base within a business' trade areas; and

¹ Esri is a private sector source for location-based demographic, business, and consumer data.

² STR, formerly known as Smith Travel Research, is an American company based in Hendersonville, Tennessee, that tracks supply and demand data for multiple market sectors, including the global hotel industry.

³ The International Council of Shopping Centers (ICSC) is the global trade association of the shopping center and retail real estate industry.

⁴ The *Visit Syracuse* report can be found at:
https://eriecanalway.org/application/files/1114/8595/9068/2015_Onondaga_Final_Report_VisitorProfile_YoungStrategies.PDF

⁵ A "trade area" is a geographic area within which a business draws a majority of its customers.

⁶ The ITE identifies business types that are sensitive to "pass-by" trips. These include businesses with drive-thrus, convenience stores, gas stations, high turnover restaurants, among others.

- Businesses that are particularly sensitive to changes in workforce availability or changes in supply-chain dynamics.

The indirect displacement of an individual business due to market change is an economic, not environmental, issue. However, the National Environmental Policy Act (NEPA) and State Environmental Quality Review Act (SEQRA) do consider the potential effects of displacement at a neighborhood level, i.e., whether a project could lead to indirect displacement that in turn leads to disinvestment in a neighborhood, which is an environmental concern. For business displacement assessments within this context, “anchor” business uses are typically of greatest concern. Anchor uses are prominent, unique, or well visited uses that draw consumers who also support other local businesses (e.g., smaller retailers, service businesses, and restaurants), so the loss of an anchor tenant can adversely affect a larger concentration of uses within a neighborhood.⁷ Indirect displacement effects are also considered at the municipal and regional levels if a project displaces a use that generates a substantial amount of tax revenue, such that the loss of the use could compromise the fiscal health of affected taxing jurisdictions. As such, this analysis considers the property tax revenues of business uses identified as potentially vulnerable to indirect displacement.

D. EXISTING EMPLOYMENT AND LABOR CONDITIONS

LABOR FORCE 2000-2019

Labor force reflects the number of working age people (16 years and older) who reside in a geographic area and who either have a job or are seeking a job. At a regional level, the City of Syracuse experienced a labor force decrease of approximately 3.6 percent between 2000 and 2019, whereas Onondaga County and the 5-County Region experienced labor force increases of 2.9 percent and 1.1 percent, respectively (see **Table 1**). A contributing factor to the decline in Syracuse labor force is the city’s shrinking population. The metropolitan area lost 10,161 residents or 1.5 percent of its population from 2010 to 2019. In addition, some of the reduction in labor force is attributable to retiring workers without people to replace them.⁸

Labor force changes varied considerably within the Project Area. As summarized in **Table 1**, the labor force in the Central Study Area overall increased by 3.8 percent between 2000 and 2019. The I-481 South and I-481 East Study Areas experienced labor force increases of 15.4 percent and 0.6 percent, respectively. The I-481 North Study Area experienced a decrease in the labor force of 4.0 percent, similar to the decrease for the City of Syracuse. The combined Project Area experienced a 3.8 percent increase in labor force overall.

⁷ An anchor tenant—sometimes called a prime or key tenant—is a featured, often regionally or nationally recognized tenant that attracts consumers to a location, and may signal to other potential tenants that a location is favorable for operations. Examples of retail anchors include major grocery stores, department stores, and national chain “big box” stores.

⁸ https://www.syracuse.com/business-news/2018/07/while_us_job_market_hums_syracuse_unemployment_rate_is_stuck_an_economy_in_nutr.html

Table 1
Change in Labor Force in the Study Areas

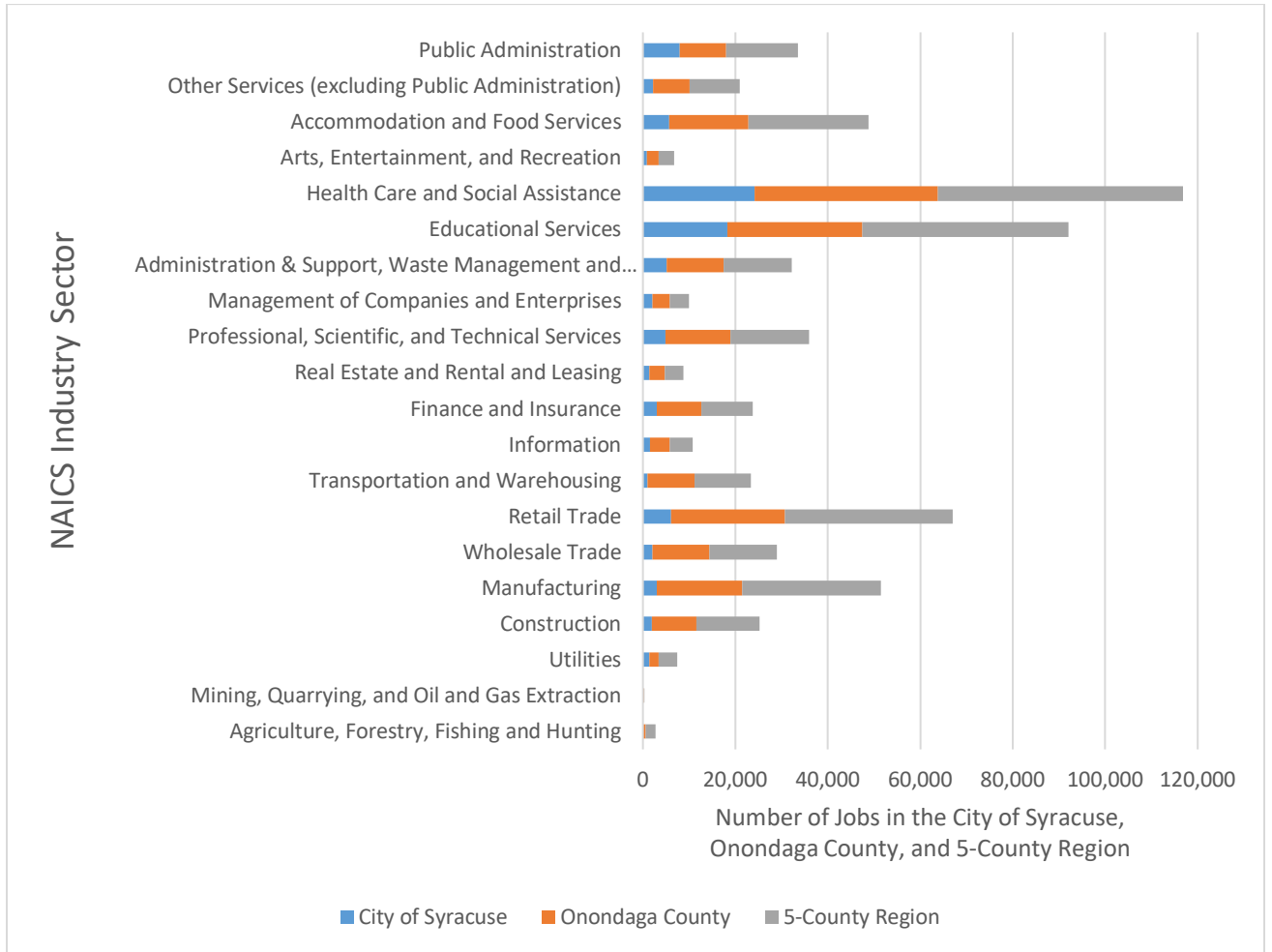
Labor Force Summary	2000	2019	Percent (%) Change
Central Study Area	22,090	22,938	3.8%
I-481 North Study Area	6,347	6,091	-4.0%
I-481 South Study Area	5,886	6,794	15.4%
I-481 East Study Area	5,532	5,563	0.6%
Total Project Area	39,855	41,386	3.8%
City of Syracuse	67,072	64,624	-3.6%
Onondaga County	228,431	235,099	2.9%
5-County Region	387,765	391,865	1.1%
Source: Census 2000 and ACS 2015-2019.			

EMPLOYMENT

Employment represents the number of filled positions within a particular geographic area. For the purpose of collecting, analyzing, and publishing statistical data, State and Federal agencies classify employment (i.e., jobs) by industry sectors as defined by the North American Industry Classification System (NAICS). This section graphically presents employment by NAICS; Attachment A provides a detailed tabulated breakdown of employment by NAICS industry category for all study areas.

- City of Syracuse, Onondaga County, and 5-County Region:** As of 2018, there were an estimated 92,369 employees in the City of Syracuse (see **Graph 1**). Health Care and Social Assistance (26.1 percent) and Educational Services (19.7 percent) are the dominant industries in terms of employment in Syracuse. These industry sectors are also prominent employers in Onondaga County, representing 17.1 percent and 12.6 percent of its jobs, respectively. Retail Trade (10.6 percent), Manufacturing (8.0 percent), and Accommodations and Food Services (7.4 percent) also represent notable sectors of employment in the County. These sectors of employment are similar to the distribution found in the 5-County Region, where of the 322,278 employees, 189,724 work primarily in Health Care and Social Assistance (16.4 percent), Educational Services (13.8 percent), Retail Trade (11.2 percent), Manufacturing (9.3 percent), and Accommodations and Food Services (8.1 percent).

Graph 1
2018 Jobs by North American Industry Classification System (NAICS)
Industry Sector: City of Syracuse, Onondaga County, and 5-County Region



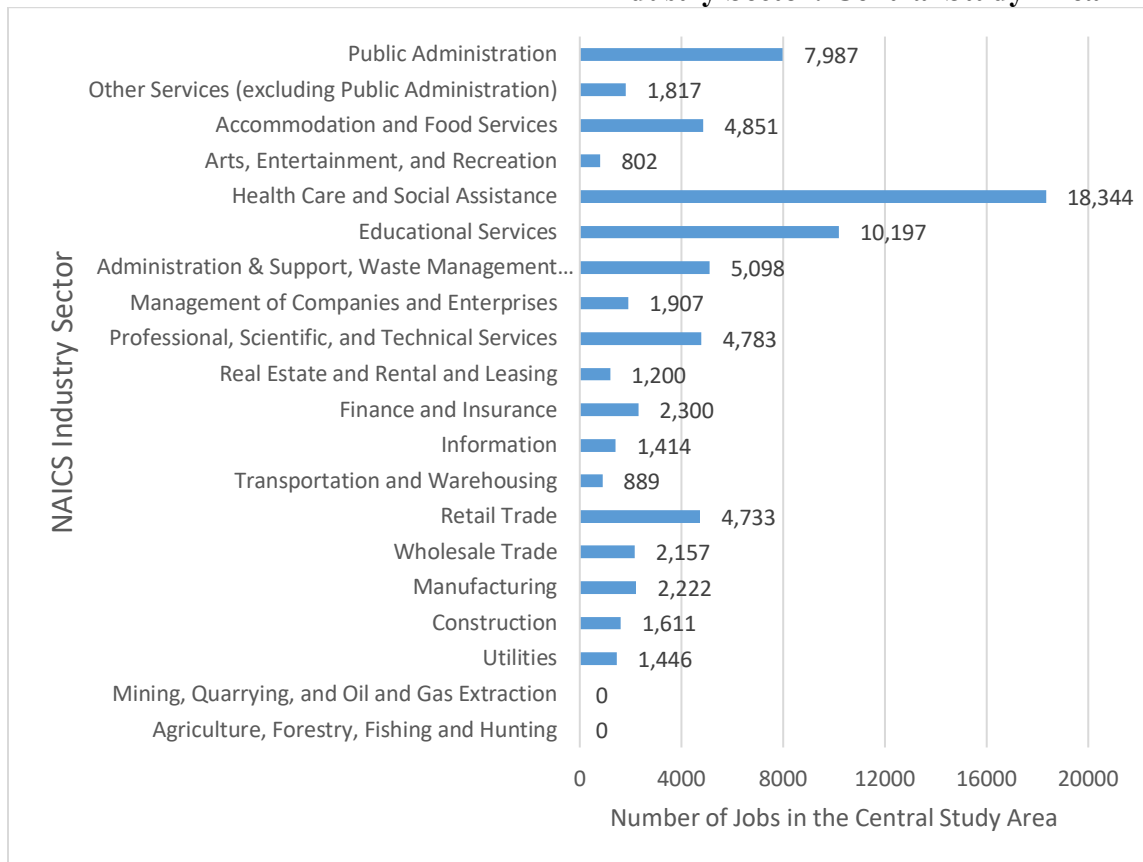
Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7.

- Central Study Area:** The Central Study Area is primarily centered on Downtown Syracuse and consists of the section of I-81 between East Brighton Avenue and Hiawatha Boulevard and the portions of I-690 approximately between Leavenworth Avenue and Beech Street and between Hiawatha Boulevard West and Bear Street. It also includes some local roads in proximity to I-81 and I-690 in Syracuse. In 2018, the Central Study Area had 73,758 workers. As shown in **Graph 2**, the two largest industries in terms of employment are Health Care and Social Assistance and Educational Services, which collectively employ over one-third of the workers in the Central Study Area. This is largely due to the presence of Syracuse University, State University of New York (SUNY) Upstate Medical University, and affiliated and other major medical institutions. The other sectors with substantial representation include: Public Administration (10.8 percent); Administrative and Support and Waste Management and

Remediation Services (6.9 percent); Accommodation and Food Services (6.6 percent); Professional, Scientific and Technical Services (6.5 percent); and Retail Trade (6.4 percent).

Major employers located in this area include medical and educational institutions, insurance and utility firms, and the Roman Catholic Diocese of Syracuse (see **Table 2**). Downtown Syracuse is located west of I-81, but the area’s largest employers—SUNY Upstate Medical University and Health System (9,525 workers) and Syracuse University (5,283 workers)—are concentrated in the University Hill neighborhood on the east side of I-81. In addition, the retail and food service businesses within Destiny USA are substantial employers.

Graph 2
2018 Jobs by North American Industry Classification System (NAICS)
Industry Sector: Central Study Area

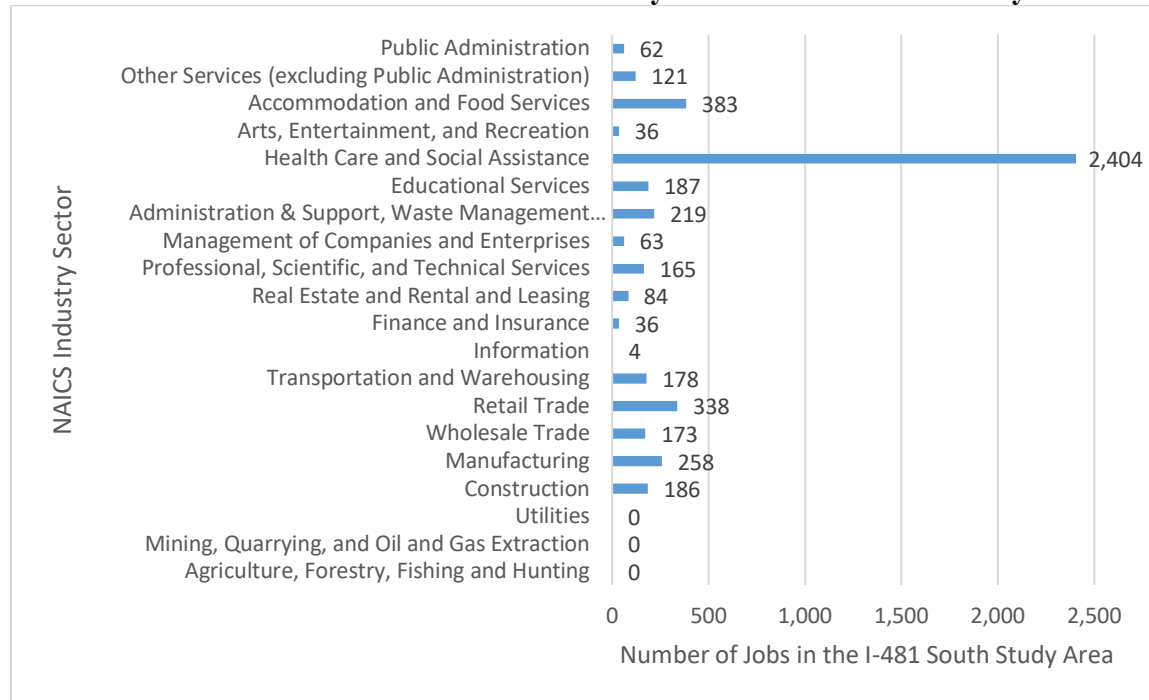


Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7.

- I-481 South Study Area:** The I-481 South Study Area is located primarily in the southern portion of the City of Syracuse (see **Figure 1**). Land uses in I-481 South Study Area are residential, commercial, and institutional, including several residential and care facilities for the elderly, such as Loretto Health and Rehabilitation Center, a short and long-term rehabilitation facility; the Heritage, an Alzheimer’s care facility; and the Bernardine, an assisted care facility. The Loretto facility is one of the largest employers in Onondaga County,

with 2,476 workers.⁹ As such, 49.1 percent of the estimated 4,897 employees in the I-481 South Study Area are in the Health Care and Social Assistance Industry (see **Graph 3**). Other industries include Accommodation and Food Services (7.8 Percent), Retail Trade (6.9 Percent), and Manufacturing (5.3 Percent).

Graph 3
2018 Jobs by North American Industry Classification System (NAICS)
Industry Sector: I-481 South Study Area



Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7.

- I-481 East Study Area:** The I-481 East Study Area, located in the Town of DeWitt, had an estimated 23,749 employees in 2018. The northern section of the study area and the area to the east of I-481 are primarily vacant, with small pockets of residential use along Pheasant Road north of Kirkland Road. To the west is a commercial park with medical, office, and industrial uses, including Upstate Orthopedics, advanced manufacturing company Inficon, Guardian Life Insurance, and other office uses. The I-481 East Study Area includes considerable transportation land use, specifically the CSX rail yard. Land north and east of the rail infrastructure is primarily vacant and includes a wooded patch around Butternut Creek. Residential uses line Fly Road to the north and west. South of the rail infrastructure, land use along Manlius Center Road is primarily commercial and industrial. It includes office uses, such as broadband services company New Visions Communications, Inc.; retail uses, such as Hearth and Home showroom; Liverpool Pool & Spa Super Center; and a Kia Dealership. Other uses include auto services, freight trucking company Santaro Development, and

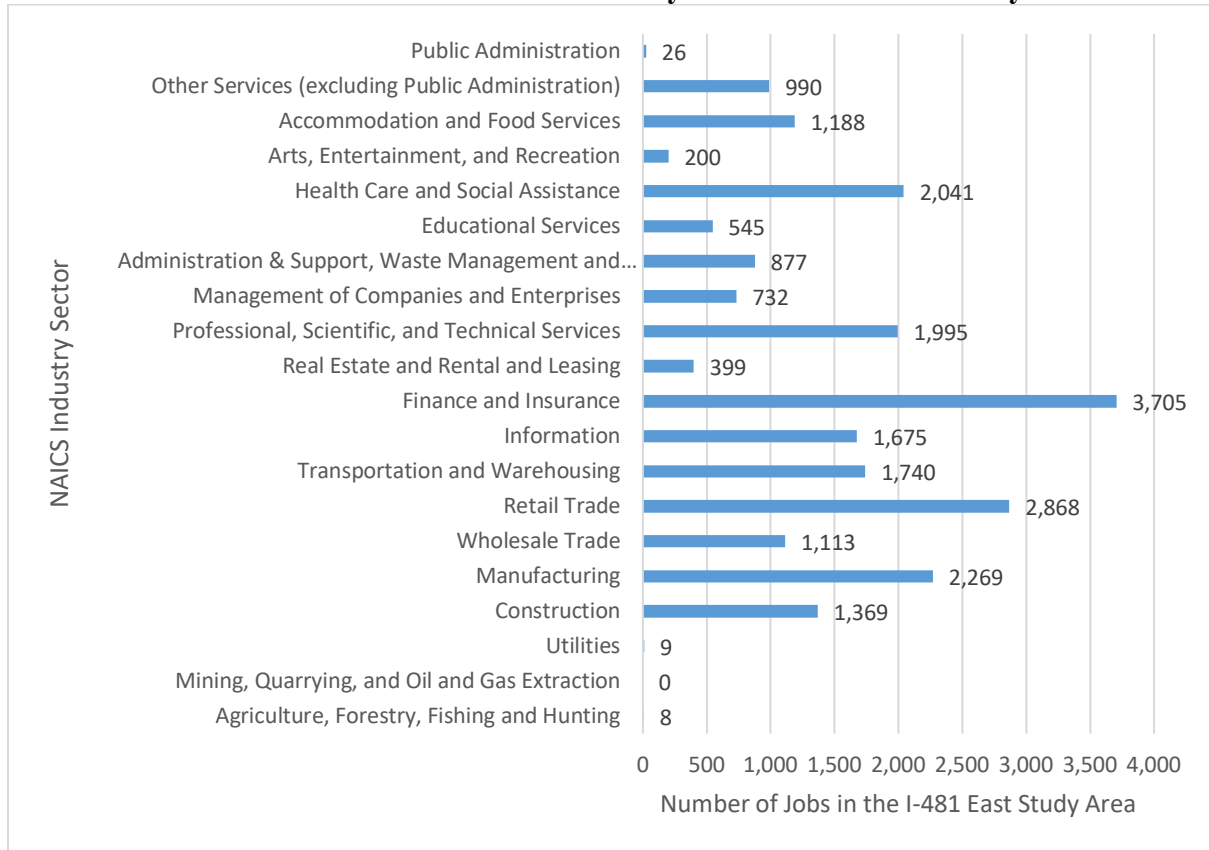
⁹ Employment at major employers is from Onondaga County (<http://www.ongov.net/about/majorEmployers.html>), last accessed 12/17/2019.

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building supply company 84 Lumber. A Walmart Supercenter is located just to the west and outside of the study area.

As shown in **Graph 4**, jobs in this area are primarily in Finance and Insurance (15.6 percent); Retail Trade (12.1 percent); Manufacturing (9.6 percent); Professional, Scientific and Technical Services (8.4 percent); Transportation and Warehousing (7.3 percent); Information (7.1 percent); Construction (5.8 percent); and Accommodation and Food Services (5.0 percent).

Graph 4
2018 Jobs by North American Industry Classification System (NAICS)
Industry Sector: I-481 East Study Area



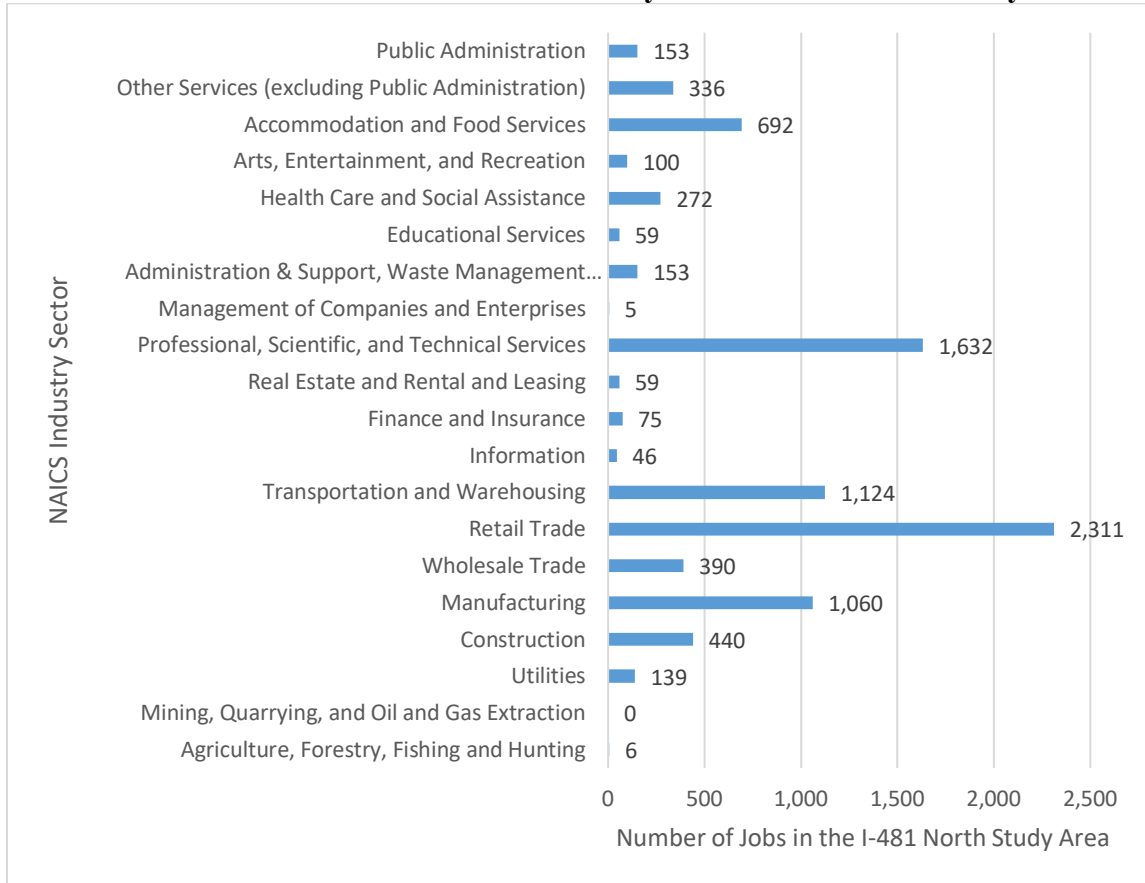
Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7.

- I-481 North Study Area:** This study area is located in the Town of Cicero and just north of the Syracuse Hancock International Airport (see **Figure 1**). In 2018, there were an estimated 9,052 employees in the I-481 North Study Area (see **Graph 5**). Jobs in this area are primarily in: Retail Trade (25.5 percent); Professional, Scientific, and Technical Services (18.0 percent); Transportation and Warehousing (12.4 percent); and Manufacturing (11.7 percent). Accommodation and Food Services (7.6 percent) is another prominent industry.

Commercial uses in the I-481 North Study Area are located near the I-81 and I-481 interchanges. The commercial concentration west of I-81 at the South Bay Road interchange

holds multiple automotive uses, including Driver’s Village, a former shopping mall that now holds many car dealerships. Around the I-481 and Northern Boulevard interchange are industrial, warehouse, and vacant land uses. One of the industrial uses is SRC, Inc., a company that has approximately 885 employees.

Graph 5
2018 Jobs by North American Industry Classification System (NAICS)
Industry Sector: I-481 North Study Area



Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7.

Table 2
Major Employers in Central Study Area

Name	Number of Employees
Upstate University Health System	9,525
Syracuse University	5,283
Crouse Hospital	2,700
National Grid	2,000
Time Warner Cable	1,800
Syracuse VA Medical Center	1,400
Roman Catholic Diocese	1,000
AXA Equitable Life Insurance	943
SRC, Inc.	885
Sources:	
Employment at major employers is from Onondaga County (http://www.ongov.net/about/majorEmployers.html), last accessed 12/17/2019, and Syracuse University (http://www.syr.edu/about/facts.html), last accessed 12/17/2019.	

E. BUSINESS DISTRICTS AND COMMERCIAL AREAS

As discussed above, local study areas have been established to assess locations where changes in traffic conditions could substantively affect business operations and/or local market conditions, both positively and negatively. These study areas include the Central Study Area, I-481 South Study Area, I-481 East Study Area, and I-481 North Study Area (see **Figure 1**). These study areas were expanded to include properties along roadways and interstate interchanges where changes in traffic volume and/or travel time are anticipated, and therefore warranted consideration as to whether there are any businesses within these areas that could be vulnerable to indirect displacement. The expanded study areas are identified as dotted lines on **Figure 1**.

CENTRAL STUDY AREA

- Downtown:** Downtown serves as the commercial center of the City of Syracuse and the greater Central New York region. Downtown generally occupies an area bordered by I-690 to the north, I-81 to the east, East Adams Street to the south, and West Street to the west and includes a mix of land uses typical of a downtown setting. This mix includes commercial uses, such as office and retail; residential and mixed-use formats (e.g., residential over ground-floor retail); institutional, including government, medical, and educational uses; and recreation, including public parks and entertainment uses. In recent years, vacant and/or underutilized office and industrial buildings have been converted into residential uses. These include the Isabelle Lofts, Masonic Lofts, and the Amos at Clinton Square, among others.

Major employers in Downtown include government, cultural institutions, and health care facilities, such as the Syracuse City Hall; the Museum of Science and Technology; the Erie Canal Museum; the Oncenter/Nicholas J. Pirro Convention Center/War Memorial Arena; and Upstate Medical University facilities. As such, of the estimated 50,589 total jobs in Downtown¹⁰ as of 2018, most jobs were in Educational Services (30.3 percent), Health Care and Social Assistance (19.1 percent), and Public Administration (14.9 percent) sectors.

¹⁰ Includes ZIP Codes 13202 and 13210.

Approximately 7.1 percent of jobs in Downtown are in Retail Trade, Accommodation and Food Services, and Arts, Entertainment and Recreation sectors.¹¹

Downtown's core has seen increased investment in recent years. Salina Street, the historical "Main Street" of Downtown, no longer serves as the city and region's primary shopping and entertainment district, due in large part to the commercial and residential sprawl that occurred throughout the mid- and late twentieth century. However, over the last two decades, streets surrounding and adjacent to Armory Square, including West Jefferson Street, Walton Street, and South Franklin Street, have been redeveloped and are now the city's primary mixed-use retail and cultural destination. The area contains approximately 2,760 residential units¹² as well as local and national retailers, numerous restaurants, the Museum of Science and Technology, and co-working facilities. Redevelopment is planned in many areas throughout the Downtown core (see **Section 6-2-1 Neighborhood Character** for a list of all recent and planned developments). Recent development is primarily residential, mixed-use commercial and office, hotels, and institutional uses.

The majority of Downtown development, business, and cultural activity is located several blocks from existing I-81 right-of-way. Generally, development patterns near I-81 lack density, and there is substantial underutilized land. Where active land uses are located within a block of the highways, the uses are often buffered from the highways' large tracts of surface parking. Additionally, the majority of recent and/or proposed development within Downtown has been located or been proposed in the higher-density, pedestrian-oriented traditional core, away from I-81 and I-690, and on University Hill. However, SUNY Upstate Medical University has and continues to develop areas adjacent to I-81.

- **University Hill:** University Hill is immediately east of I-81 between Genesee Street and East Colvin Street. University Hill is the City's educational and medical district. The defining land uses are institutional and include Syracuse University, SUNY College of Environmental Science and Forestry (SUNY ESF), SUNY Upstate Medical University, Crouse Hospital, Syracuse Veterans Affairs (VA) Medical Center, and Richard H. Hutchings Psychiatric Center. The majority of non-institutional commercial and residential uses either supports or is affiliated with the institutions and caters primarily to university and medical staff, students, and the institutions' visitors. Commercial uses include several hotels, as well as retail, the latter primarily along Marshall Street and South Crouse Avenue. Part of the SUNY Upstate campus is located west of Almond Street along Harrison and Adams Streets. This area has also seen the recent development of several apartment buildings that cater to students of the universities and residents from the hospitals.
- **Destiny USA:** The six-story Destiny USA is the one of the nation's largest shopping centers and is accessible from I-81 and Hiawatha Boulevard. The shopping center is surrounded by acres of surface parking lots. Destiny USA is a destination retail use, attracting customers from the City of Syracuse, Onondaga County, and 5-County Region. To the south of Destiny USA, the Inner Harbor area surrounds a port on Onondaga Creek. A former industrial site, Inner Harbor now includes marinas, a hotel, and commercial office and retail uses. This area also has large tracts of vacant land where former industrial and warehouse uses have been demolished. Some tracts have been slated for new commercial and/or residential development.

¹¹ U.S. Census Bureau's OnTheMap, accessed March 8, 2021.

¹² U.S. Census Bureau 2013-2017 American Community Survey 5-Year Estimates for Zip Code 13202.

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- **Interchanges 23 and 24:** Just north of Destiny USA is a commercial and industrial area. There are a few fast food, coffee shops, and convenience retail locations in this area, but it is primarily characterized by warehouse and industrial uses. The retail businesses in this area primarily serve local residents from the residential neighborhood to the east, as well as employees and patrons of the warehouse and industrial uses.
- **Interchange 25:** The interchange of I-90 (New York State Thruway) and I-81 is located approximately 1.5 miles southwest of the Syracuse Hancock International Airport. North of I-90 is primarily single-family residential neighborhoods. South of I-90, along 7th North Street, is a predominantly commercial area. There are 11 hotels, all national brands, located within one mile of this interchange, clustered along the 7th North Street corridor. There are also a number of convenience goods and services, retail, and restaurant uses in this area, including a Pilot Travel Center south of I-90 and east of I-81. The commercial uses at this interchange tend to be highway and airport oriented—i.e., serving the traveling public and truckers traveling on I-90 and I-81. The retail, fast food, convenience goods and services, and hotel uses at this interchange generate approximately 6 percent of the property tax revenue for the Town of Salina (see **Attachment C**).

I-481 SOUTH STUDY AREA

To the north and east of the I-481 and I-81 interchange is a mix of commercial, automotive, and industrial uses along East Brighton Avenue and Ainsley Drive. In addition to numerous auto body and repair establishments, uses include the Syracuse University Physical Plant, tech company Arcom, several wholesalers, a kitchen and bath warehouse, the Willow Rock Brewing Company and tasting room, automobile and machinery rentals, and offices for Pro Literacy Worldwide. These local commercial and retail uses primarily serve residents and employees of the Southside and Brighton neighborhoods.

Interchange 15 in the Town of LaFayette was identified because of the potential changes in travel times to this location from points north, such as Baldwinsville and Destiny USA, under the Community Grid Alternative (see **Attachment B**), but the traffic volumes would not change substantially at this location. Interchange 15 is a small commercial area concentrated around the interchange. Businesses include McDonald's, Circle K Gas Station, Dollar General, NAPA Auto Parts store, and M&T Bank. These convenience retail and restaurant uses primarily serve the surrounding rural residential area and pass-by travelers on I-81.

I-481 EAST STUDY AREA

Manlius Center Road, which extends beyond the study area boundary, is primarily commercial and industrial. This includes office uses, such as broadband services company New Visions Communications, Inc.; retail uses, such as Hearth and Home showroom; Liverpool Pool & Spa Super Center; and a Kia Dealership. Other uses include auto services, freight trucking company Santaro Development, and building supply company 84 Lumber.

I-481 Interchanges 2 and 7 were identified due to the potential change in pass-by trips under the Community Grid Alternative. The area around Interchange 2 is primarily single-family residential uses to the north and industrial gravel mining operations to the south. The area in the vicinity of Interchange 7 is zoned Hi-Tech, and includes a mix of office, commercial, and medical office uses.

I-481 NORTH STUDY AREA

Located near the interchange of I-81 and I-481 is Driver's Village, a former shopping mall that now holds several automobile dealerships. Automobile dealerships draw customers from a wide catchment as people are willing to travel longer distances to price-compare automobiles as compared to other consumer goods. To the west of Driver's Village there are a number of convenience goods and services, neighborhood retail, and restaurant businesses along North Main Street/Brewerton Road. Major retailers along this corridor include a Walmart Supercenter, Wegmans grocery store, Home Depot, Lowe's, and Price Chopper. This area, primarily in the Town of Cicero, was identified because of the potential changes in travel times to this location from points south under the Community Grid Alternative (see **Attachment B**). These retail uses are supported by several local restaurants and fast food establishments including McDonald's, Taco Bell, and KFC. The concentration of major national retailers at this location makes it a destination retail area drawing from Syracuse and its northern suburbs. While Driver's Village is highly visible from existing I-81, these other retail and fast food uses have limited visibility and wayfinding, thus limiting their draw of pass-by consumers from I-81.

At Interchange 30 is another cluster of restaurants, retail, and convenience goods and services businesses including an Aldi grocery store, Cracker Barrel, diners, Walgreens, and Comfort Inn. These convenience retail, grocery, and restaurant uses primarily serve pass-by consumers traveling on I-81, and the surrounding suburban and rural residential areas. Hotel and food information signage for businesses at this Interchange is available on I-81.

F. SPECIFIC BUSINESS TYPES

FREIGHT (TRUCKING)

As shown in **Figure 2**, there are a number of freight and truck-oriented businesses within the study areas, including warehouse and distribution centers, as well as trucking companies. These businesses are primarily concentrated on the outskirts of Syracuse, particularly in the vicinity of the I-481 North Study Area and the I-481 East Study Area, which are nearest to the New York State Thruway (I-90) and Syracuse Hancock International Airport. As discussed above, the transportation and warehousing sector is a major employer in the I-481 North Study Area, comprising approximately 12.4 percent of the workforce. In the I-481 East Study Area, it comprises approximately 7.3 percent of the workforce.

The existing interstate highway system in and around the study areas includes I-81, I-90, I-690, and I-481, and these interstates are the primary routes that trucks use through the area. In addition, **Figure 2** identifies the Principal Arterial, Major and Minor Collector, and Local Roads that may also be used by trucks.¹³ The Principal Arterial roads are the primary roads that trucks use to travel through the study areas, whereas the Major and Minor Collector and Local Roads are primarily used to access points within the City of Syracuse.

Based on traffic data collected for the Project, trucks account for approximately 8 percent of northbound I-81 vehicles in both the AM and PM peak periods within the Central Study Area. Truck traffic accounts for about 9 percent and 10 percent of the southbound I-81 traffic in the AM and PM peak periods, respectively. Within or near the I-481 North, I-481 South, and I-481 East

¹³ Principal Arterial, Major and Minor Collector, and Local Roads are NYSDOT Functional Classifications.

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Study Areas, trucks account for approximately 7 percent and 9 percent of vehicles traveling northbound on I-481 in the AM and PM peak periods, respectively; and for 6 percent of southbound I-481 traffic in both the AM and PM peak periods.

Trucks coming from the north and south currently travel on I-81 to access points within the City of Syracuse and destinations south of its northern interchange with I-481, such as the Syracuse Hancock International Airport. I-481 is currently used to bypass the City of Syracuse or to reach points east of the City. Both I-81 and I-481 provide access to I-690 and I-90; as such, trucks may use either route to access destinations within these corridors.

MEDICAL

Numerous medical institutions are located within the Central Study Area, including St. Joseph's Hospital, SUNY Upstate Medical University, Crouse Hospital, and Syracuse VA Medical Center. These medical institutions are currently accessible from I-81 Interchanges 18, 19, and 20. As discussed above, the health care industry is a major employer in the region and, in particular, in the Central and I-481 South Study Areas, where the sector employs approximately 24.9 percent and 49.1 percent of the workforce, respectively.

INSTITUTIONS OF HIGHER LEARNING

Syracuse University is located within the Central Study Area. The approximately 270-acre campus is located east of I-81 and south of the I-690 interchange. Syracuse University is a major employer and source of economic activity within the Central Study Area. Total university enrollment in the fall of 2017 was approximately 22,484 students. Syracuse University employs 920 tenured and tenure-track faculty; 837 non-tenure-track faculty; and 3,524 staff.¹⁴

SUNY Upstate Medical University, identified above under "Medical," also falls under this category of businesses, as it is an educational institution in addition to providing medical services.

Also within the Central Study Area is SUNY ESF. The approximately 12-acre ESF campus supports a total enrollment of 1,800 undergraduate students and 400 graduate students.¹⁵ SUNY ESF employs 205 faculty and staff.¹⁶

In total, 13.8 percent of the workforce in the Central Study Area is in the educational services industry.

RETAIL

Retail concentrations within the City of Syracuse and Onondaga County serve as the primary retail destinations for the 5-County Region. Downtown Syracuse contains locally owned stores and small national retailers, concentrated in and around Armory Square and along South Salina Street, the traditional Downtown retail spine. The majority of local and regional retail is located outside of the Central Study Area (including Downtown) in portions of Syracuse and surrounding Onondaga County. Generally, retail within the region is located in shopping centers anchored by mid-box or big-box format stores along arterial roadways, in regional malls, and interspersed with other uses in small storefronts along the main streets of towns.

¹⁴ <http://www.syr.edu/about/facts.html>, last accessed 12/17/2019.

¹⁵ <https://www.esf.edu/welcome/>, last accessed 12/17/2019.

¹⁶ <http://www.esf.edu/faculty/>, last accessed 12/17/2019.

Destiny USA is located in the Central Study Area. With approximately 2.4 million square feet of retail and entertainment space, including over 300 stores, it is the largest shopping mall in New York State. Other shopping centers in the City of Syracuse are found off I-81 to the north of Downtown near the airport, along Erie Boulevard to the east of Downtown, Genesee Street to the west of Downtown, and in smaller neighborhood concentrations.

Based on data from Esri’s ArcGIS Business Analyst, the 5-County Region contains approximately 5,857 retail establishments. As shown in **Table 3**, many establishments (approximately 30 percent) are food service and drinking places. Miscellaneous store retailers represent 11 percent of establishments, and food and beverage stores (including grocery stores) represent approximately 10 percent. Retail establishment data from Esri for the U.S. indicate that the distribution of retail establishments across retail sectors is generally similar for the metropolitan area and the nation as a whole, with the exception of a higher percentage of food service and drinking places in the 5-County Region.

Table 3
Retail Establishments in the 5-County Region, 2017

Retail Type	Number	Percent of Total Retail
Motor Vehicle & Parts Dealers	551	9%
Furniture & Home Furnishing Stores	210	4%
Electronics & Appliance Stores	179	3%
Building Materials, Garden Equipment & Supply Stores	366	6%
Food & Beverage Stores	574	10%
Health & Personal Care Stores	334	6%
Gasoline Stations	227	4%
Clothing & Clothing Accessories Stores	399	7%
Sporting Goods, Hobby, Book & Music Stores	296	5%
General Merchandise Stores	243	4%
Miscellaneous Store Retailers	620	11%
Non-store Retailers	72	1%
Food Service & Drinking Places	1786	30%
TOTAL	5857	100%
Sources: Esri’s ArcGIS Business Analyst. Esri and Infogroup. Esri 2019 Updated Demographics. ArcGIS Business Analyst 2017 Retail MarketPlace.		

Regionally, retail has experienced decentralization over the years, with large-scale shopping centers found in suburban locations to the east, west, and north of Syracuse in surrounding Onondaga County. In DeWitt to the east, Erie Boulevard (NY-5) near the I-690 and I-481 interchange is lined with stand-alone national retailers, shopping centers, and the nearly one million-square-foot Shoppingtown Mall, which is in bankruptcy and largely vacant. Similarly, Genesee Street to the west in Camillus is lined with large, national retail stores. In North Syracuse, US-11 north of I-481 also hosts a number of national chains. Farther north, the town of Clay is home to the Great Northern Mall, an 896,000-square-foot mall situated at the intersection of I-481 and NY-31, as well as a number of freestanding chain retailers, located just west of the mall.

There are fewer shopping centers located in the four counties surrounding Onondaga County. To the south, the primary retail concentration in Cortland County is found near the convergence of NY-281 and NY-13 to the west of Downtown Cortland, which includes the approximately 476,000-square-foot Cortlandville Crossings as well as smaller shopping centers anchored by mid-

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or big-box establishments or grocery stores. Retail in Madison County to the east is generally centered along NY-5 in the northern portion of the county, but options are limited to scattered retailers and stand-alone big-box retailers. Retail in Oswego County to the north is concentrated in Fulton, at the convergence of I-481 and NY-3, and in Oswego, along NY-104 near I-481. A larger concentration of retail is found along NY-20 in Cayuga County, just west of Auburn.

Local retail in the Central Study Area is largely concentrated in Downtown, with Salina Street serving as the traditional Downtown retail corridor and Armory Square providing an example of retail growth through mixed-use revitalization. However, the primary retail concentration is located in the northernmost area of the study area adjacent to I-81—Destiny USA. Additional smaller retail clusters are located throughout Downtown. East of I-81, there is a concentration of retail toward the northern end of the Syracuse University campus, with some additional retail located along East Genesee Street. Retail in the University Hill area—especially along Marshall Street—tends to be college-oriented, catering to the students and employees of Syracuse University and SUNY ESF.

Based on 2017 data from Esri’s ArcGIS Business Analyst, the Central Study Area currently contains approximately 694 businesses, including 449 retail establishments and 245 food service and drinking places, with an estimated \$1.2 billion in annual sales (see **Table 4**). According to Esri data, retail sales at these 694 businesses account for nearly 10 percent of all retail sales within the 5-County Region. At the same time, demand for retail goods and services from households living in the Central Study Area is estimated at \$169.1 million. The estimated retail sales (\$1.2 billion) compared to the local residential expenditure potential (\$169.1 million) indicates that the Central Study Area is drawing retail sales from a base much wider than its own year-round residential population, including from workers, tourists, and other visitors, making it a retail destination that serves a broader trade area.

Table 4
Retail Demand, Sales, and Capture Rates for Central Study Area

Retail Sector	Retail Demand (Millions of 2017 Dollars)	Retail Sales (Millions of 2017 Dollars)	Retail Surplus (Millions of 2017 Dollars)	Capture Rate (% of Demand Captured In Specified Area)	Number of Businesses
Total Retail Trade	\$169.1	\$1,065.8	\$896.7	630%	449
Total Food Services & Drinking Places	\$18.4	\$159.3	\$140.9	864%	245
TOTAL	\$187.5	\$1,225.2	\$1,037.6	653%	694
Notes:					
¹ Retail sales estimates sales to consumers by establishments. Retail demand (expenditure potential) estimates the amount spent by consumers at retail establishments.					
Source: Esri’s ArcGIS Business Analyst, 2017 Retail Market Place Profile report.					

While multiple business districts with retail are located within the Central Study Area, including Downtown (Armory Square) and University Hill (Marshall Street), the primary retail destination and driver is Destiny USA. The mall’s national and local retail, dining, and entertainment attractions draw customers from the City of Syracuse, the Region, and elsewhere in New York State, Pennsylvania, and Canada. As such, Destiny USA, like many large shopping malls, relies in part on its proximity to highways as they provide regional high-capacity access to and from these facilities.

Destiny USA is an important component of the local and regional economy as a result of revenue generated from the 8 percent sales tax on retail goods. Of this, 4 percent goes to the County and 4 percent goes to the State. The center is exempt from most property taxes under a 30-year agreement with the City of Syracuse that expires in 2037.¹⁷ Based on ICSC retail sales data for malls in the Northeast U.S., Destiny USA generates an estimated \$1.3 billion in annual retail sales, resulting in an estimated \$52.8 million in sales taxes to Onondaga County and \$52.8 million to the State of New York.¹⁸

HOTELS

According to STR, there are an estimated 9,419 hotel rooms in the greater Syracuse Metropolitan Area. This includes a mix of national brands and locally owned hotels, and the full range of price points (economy through luxury). This figure includes hotel rooms in downtown and central business districts, small towns, and highway interchange locations. Between 2013 and 2019, hotels within the Syracuse Metropolitan Area had an average occupancy rate of 56.9 percent. Revenue per available room (RevPAR) in the Syracuse Metropolitan Area was \$57.10.

As previously noted, the Community Grid Alternative may change travel patterns in the vicinity of Interchanges 23 through 25 where there are several hotels. The potential effects of these changes are described below, and the following data is provided as context for that analysis. There are 1,676 rooms at the 14 hotels north of Downtown near I-81 Interchanges 23 and 25. These 14 hotels had an average occupancy rate of 58.9 percent between 2013 and 2019. Revenue per available room (RevPAR) was \$57.25. Several factors contribute to these hotels' slightly higher performance metrics as compared to Syracuse as a whole. These include the age and quality of the hotels, their proximity to regional destinations including the Syracuse Hancock International Airport and Destiny USA, and their proximity to major highways (I-81 and I-90). Eleven of these 14 hotels are classified as Upper Midscale Class or greater; this is a much greater percentage than the Syracuse Metropolitan Area, where 59 of the 137 properties (about 43 percent) are classified as Upper Midscale Class or greater.

G. POTENTIAL SOCIAL AND ECONOMIC IMPACTS OF THE COMMUNITY GRID ALTERNATIVE

This section analyses the potential for induced growth and economic benefits, as well as the potential for indirect (or secondary) business displacement, of the Community Grid Alternative. The analysis is presented by study area.

¹⁷ Tim Knauss, "Destiny USA Won't Expand Again; Syracuse Won't Get Tax Payments for 30 Years," *Syracuse.com*, June 06, 2012, http://www.syracuse.com/news/index.ssf/2012/06/destiny_usa_wont_be_growing_la.html, (Accessed December 4, 2019).

¹⁸ Retail sales estimates for Destiny USA utilize ICSC data because Esri's ArcGIS Business Analyst does not provide a complete estimate of the mall's sales. AKRF's estimate of Destiny USA retail sales assumes \$550 in sales per square foot of \$550 (from ICSC) for the mall's approximately 2.4 million square feet of gross leasable area.

CENTRAL STUDY AREA

POTENTIAL GROWTH INDUCEMENT

The Community Grid Alternative would improve the connectivity of the Central Study Area by re-establishing east-west crossings along Almond Street, re-establishing the street grid in the Near Eastside, providing new access points to and from I-690 and the portion of I-81 that now travels through Syracuse and that would be reclassified as Business Loop 81 (BL 81), and providing improved pedestrian and bicycle amenities and connections between Downtown/Southside and University Hill/Near Eastside. This would improve the flow of people and goods between these neighborhoods, and is expected to result in improved economic activity in the Central Study Area due to improved conditions for development currently supported by market conditions, namely mixed-use residential and commercial.

BL 81 would extend between the existing southern I-481 interchange (Interchange 16A) and the existing northern I-481 interchange (Interchange 29). Several local streets formerly severed by the I-81 viaduct would be re-established, and a new interchange between I-690 and Crouse and Irving Avenues would establish a new entry corridor to the Near Eastside and University Hill. Under the Community Grid Alternative, I-481 would be designated I-81 and would carry four to six lanes of through traffic around the eastern side of Syracuse.

The Community Grid Alternative would promote the use of the street grid throughout the Central Study Area, including the reconnection of some streets (e.g., the extension of Irving Avenue to I-690) and the restoration of others (e.g., Oswego Boulevard and Pearl Street). The re-establishment of the street grid in this area would potentially open three parcels for development totaling approximately 2.25 acres. In addition, removal of the highway infrastructure would create four new parcels totaling approximately 2.45 acres with potential for development to the west of Almond Street from land currently used for surface parking under the existing I-81 viaduct and I-690 ramp. As further discussed below, the potential redevelopment of these parcels could add to local property tax revenues and may increase local sales taxes, should parcel(s) be redeveloped with retail.

West Street ramps to and from I-690 would be reconfigured, and the West Street overpass would be removed. This would improve the visual and physical connection between Downtown and the Near Westside. It would also provide an opportunity to expand the Creekwalk and relocate a portion of the trail to be adjacent to Onondaga Creek. Between I-690 and the BL 81, ramps would be reconstructed to standards, which would improve connectivity between the two highways. Increased visibility and pedestrian activity between these neighborhoods are expected to have a beneficial effect on the local economy. The transportation and pedestrian improvements would improve community character and cohesion by removing the existing viaduct—both a visual and physical barrier to redevelopment. These improvements, along with ReZone Syracuse, could encourage new mixed-use commercial and residential development.

The Community Grid Alternative could encourage some new development by removing the elevated highway and improving connections across Almond Street. The Community Grid Alternative would remove the I-81 viaduct above Almond Street from the New York, Susquehanna, and Western Railway bridge (at Renwick Street) to the I-81/I-690 interchange and replace it with a surface street. Former highway traffic with destinations in Syracuse would use numerous north-south and east-west streets, resulting in greater use of the local street network. Almond Street would carry two lanes in each direction, as well as turning lanes when needed. Almond Street would include a planted median with breaks at key intersections and parallel

parking where reasonable. The alternative would also include pedestrian and bicycle amenities with new or wider sidewalks and cycle tracks or shared use paths on Almond Street. A new interchange between I-690 and Crouse and Irving Avenues would establish a new entry into the Near Eastside and University Hill from I-690.

The vast majority of the land beneath the existing viaduct would be used for transportation, pedestrian, and parkland improvements in the Community Grid Alternative. However, new developable parcels would result from the demolition of I-81 and reestablishment of the street grid between Oswego Boulevard and North State Street, and the demolition of I-81 and the I-690 ramps west of Almond Street, totaling approximately 4.7 acres. In addition, the removal of the highway could spur redevelopment of existing privately owned underdeveloped parcels and surface parking areas on either side of I-81.

Any new development within the Central Study Area would be subject to local zoning requirements. The City of Syracuse recently underwent a city-wide zoning text and map update called ReZone Syracuse. The Final Draft Zoning Ordinance, dated May 2019, proposes to rezone much of the area adjacent to the existing I-81 within the Central Study Area as “MX-5 Central Business District.” According to the draft, the proposed new MX-5 District would consolidate the numerous existing Central Business District zones that have a wide range of uses allowed and dimensional standards. The proposed zoning would implement the Downtown Overlay character area, increase maximum heights and densities with minimal parking, prohibit first floor residential, and would have the greatest range of uses including retail, service, commercial, entertainment, and small-scale manufacturing. Therefore, new development in this area would likely be mixed-use, and could include combinations of residential, retail, medical, educational, or office uses. Redevelopment of these properties consistent with ReZone Syracuse would increase employment and business opportunities in the Central Study Area. With their improved pedestrian, bicycle, and visual connections, these development parcels could attract institutional and/or private investment (e.g., mixed use residential and commercial) to the area for housing and supportive retail adjacent to jobs.

There are also several vacant and underutilized properties near the new I-690 interchange at Crouse and Irving Avenues. This new interchange would enhance the connection from I-690 to and from University Hill, which would increase the desirability of this area for infill development. ReZone Syracuse designates this area as MX-3 Residential/Office for the two blocks nearest I-690, and MX-4 Urban Core nearest the University Hill. The MX-3 district promotes pedestrian-friendly, transit-supportive higher-density residential development and compatible nonresidential office and commercial uses. It permits greater vertical or horizontal mixing of uses and a range of residential housing types, apartments, and live-work units.

The new MX-4 district also promotes pedestrian-friendly and transit supportive higher-density residential development and commercial uses, but at greater heights, density, and range of uses than MX-3. The MX-4 district accommodates larger-scale commercial and retail uses, consistent with the urban core location. ReZone Syracuse and private investment would ultimately determine the future use of large vacant and underutilized properties in near the new I-690 interchange. However, the improved connection to University Hill, and improved streetscape experience under the Community Grid Alternative would build on the rezoning efforts. As such, the Community Grid Alternative could spur new mixed-use development of privately owned vacant or underutilized properties in the area.

In addition, the removal of the West Street overpass and creation of a signalized intersection at that location would include pedestrian crossings and result in improved visual connections, as well

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as enhanced vehicular, pedestrian, and bicycle connectivity. Further, the reconstruction and extension of North Clinton Street would provide a new and alternate route to Downtown as well as pedestrian and bicycle amenities. These new amenities associated with the Community Grid Alternative could attract new development to this area. This area would also be zoned MX-5, and thus new development in this area would likely be mixed-use, and could include combinations of residential, retail, medical, educational, and office uses. Redevelopment of these properties consistent with ReZone Syracuse would increase employment and business opportunities in the Central Study Area.

Overall, the Community Grid Alternative would potentially induce new development on approximately 4.7 acres through reestablishing the street grid between Oswego Boulevard and North State Street, and the demolition of I-81 and the I-690 ramps west of Almond Street. These actions would make land under the I-81 viaduct and I-690 ramps, currently used for surface parking, available for redevelopment. In addition, the removal of the highway could spur redevelopment of existing privately owned underdeveloped parcels and surface parking areas on either side of I-81. Without the elevated viaduct, land adjacent and beneath the viaduct that has been either vacant or used for parking for many years would likely be more attractive for development, based in part on improved connections and safety. Properties would no longer be encumbered, and the downtown would no longer be visually and physically segregated by the viaduct. Other factors that would increase development potential because of the viaduct removal include new or wider sidewalks and bicycle facilities; unobstructed views for residents/tenants on lower floors; and improved visibility of potential neighborhood-oriented ground floor retail uses, which rely on visibility to draw customers. In accordance with ReZone Syracuse, new development would likely be higher density mixed-use residential and commercial. Given the limited amount of land to be made available, new development is not anticipated to substantively alter traffic volumes in the area. Consistent with local land use and zoning, new development would be neighborhood-oriented or would support the existing major institutions that already draw traffic to the study area.

POTENTIAL INDIRECT BUSINESS DISPLACEMENT

The Community Grid Alternative would result in changes in travel times, and changes in the volumes and types of trips at certain study area locations. The following section considers these factors' influences on commercial market conditions to determine whether any existing businesses could be vulnerable to indirect business displacement.

The decrease of traffic volume within the Central Study Area is primarily attributable to the diversion of existing I-81 traffic to I-481. This traffic reflects primarily interstate highway-oriented trips that pass through Syracuse on the I-81 viaduct and are not necessarily those of patrons of businesses within the Central Study Area. Although the volumes on BL 81 would be lower than on existing I-81 in the Community Grid Alternative, they would be at street level and at lower speeds. Businesses on BL 81 south of I-690 would experience an increase in pass-by potential customers, which could marginally benefit sales for businesses able to capture sales from street-level traffic. Furthermore, the business loop designation may attract through travelers on I-81 looking for convenience retail and restaurant uses.

By removing the viaduct and dispersing traffic to local streets, the Community Grid Alternative would result in increased travel times for some trips, particularly those from the south that would otherwise travel along I-81 to their destination. Changes to local street traffic patterns could also slightly affect travel times on local streets. Average daily travel times to destinations within the

Syracuse Metropolitan Area were estimated based on the Syracuse Metropolitan Transportation Council (SMTC) Regional Travel Demand Model (see **Chapter 5, Transportation and Engineering Considerations**). **Figures 3** through **5** show the average daily travel times in 5-minute intervals to destinations within the Syracuse Metropolitan Area for the No Build, Viaduct, and Community Grid Alternatives. **Figures 6** through **8** provide a detail of the Central Study Area with 2-minute intervals. As shown in these figures, there is not a substantial difference in average travel times between the No Build, Community Grid, and Viaduct Alternatives. In most instances, there is no difference—or a difference of two minutes or less—in average daily travel time. A more detailed analysis of individual origins and destinations is provided in **Attachment B**.

Under the Community Grid Alternative, the portion of I-81 between the existing southern I-481 interchange (Interchange 16A) and the existing northern I-481 interchange (Interchange 29) would be reclassified as Business Loop (BL) 81. I-481 would be designated I-81 and would carry between four and six lanes of through traffic around the eastern side of Syracuse.

As further discussed in **Chapter 5, Transportation and Engineering Considerations**, the Community Grid Alternative would result in some slight travel time increases through the Project Area. **Chapter 5, Transportation and Engineering Considerations**, presents the estimated travel times, delay and speeds for 11 travel routes by direction during the AM and PM peak hours. During the AM peak hour, increases in travel time are up to five minutes, and during the PM peak hour, increases in travel time are up to six minutes. Outside of the peak hours, the changes in travel times would be the same as or less than in the peak hours.

Table 5 below presents the change in AADT between the existing, No Build, and Community Grid Alternative conditions. Substantial increases or decreases in traffic volumes could affect businesses' customer base; in particular, businesses that rely on pass-by traffic such as gas stations, convenience stores, and fast food. As shown in **Table 5**, there would be modest increases or decreases in volume under the Community Grid Alternative. The most substantial decrease would be at the I-81 southbound entrance ramp to I-81 from Old Liverpool Road and at the entrance ramp to I-81 from NY 370, which would see a combined decrease of 4,533 vehicles per day (a 32.7 percent decrease as compared with the No Build Alternative).

Table 5

Average Annual Daily Traffic (AADTs) Volumes at I-81 Interchanges 23, 23A, and 25 in the Existing, No Build Alternative and Viaduct Alternative Conditions

Interchange and Movement		Existing AADT	No Build AADT (2026)	Change in AADT Existing to No Build	Community Grid AADT (2026)	Change in AADT from No Build to Community Grid
Northbound I-81						
23	Northbound exit to Hiawatha Blvd/Harborside Dr	16,035	15,755	(280)	15,068	(686)
	Northbound entrance from Hiawatha Blvd	7,050	7,371	321	8,718	1,347
25	Northbound exit to 7th North St.	6,156	6,571	415	5,522	(1,048)
	Northbound entrance from 7th North St	5,962	6,026	64	6,425	399
25A	Northbound exit to I-90	4,315	4,725	410	4,308	(417)
	Northbound entrance from I-90	5,972	6,203	231	6,686	484
Southbound I-81						
25A	Southbound exit to I-90	4,815	4,945	130	5,061	115
	Southbound entrance from I-90	3,609	3,818	209	2,500	(1,317)
25	Southbound exit to 7th North St	6,106	6,339	233	6,669	330
	Southbound entrance from 7th North St	4,510	4,924	414	4,369	(555)
23A	Southbound exit to Hiawatha Blvd	11,053	11,785	732	11,603	(182)
	Southbound entrance from Old Liverpool Road	3,916	3,900	(16)	7,773	(4,533)
	Southbound entrance from NY 370	8,465	8,406	(59)		

Source: Parsons, 2020.

A national study of the impact of retail proximity on consumer purchases found that 92 percent of urban consumers typically travel 15 minutes or less to make their everyday purchases. Typical travel times were 1 to 7 minutes for fuel; 8 to 12 minutes for groceries, fast food, and casual dining; 13 to 16 minutes for oil changes, hair salons, and home and garden retailers; and 17 to 20 minutes for movies and clothing or shoe retailers.¹⁹ Given these typical driving distances, the businesses within the Central Study Area providing everyday goods and services would retain their existing customer bases with the Community Grid Alternative. This is because travel times would not substantially change, and their existing customers travel from nearby locations such that re-routing would not provide shorter travel times to comparable goods and services.

StreetLight data²⁰ were used to estimate the potential loss in patronage at select business uses in the Central Study Area due to their inability to capture “pass-by traffic” that would be re-routed to I-481. The business uses selected were the hotel cluster in the vicinity of the I-81/I-90 interchange, Destiny USA, and the Pilot Travel Center south of I-90 and east of I-81. These

¹⁹ Access Development. *National Consumer Study Summary: The Impact of Retail Proximity on Consumer Purchases*. 2016-17.
https://cdn2.hubspot.net/hubfs/263750/Access_Consumer_Spend_Study_2016.pdf

²⁰ StreetLight Data is an on-demand mobility analytics platform that takes and analyzes vehicle movements using data from mobile devices, connected cars and trucks, as well as census data, road network information and more. This data can be used to determine the number of trips during different periods of time; trip variations by day, time period and vehicle type; traffic volumes; and identify trip time, length, speed and trip purpose.

business uses were selected because their consumer trade areas²¹ extend beyond the Central Study Area. As noted above, businesses whose trade areas do not extend beyond this area would not be expected to lose customer base due to re-routing under the Community Grid Alternative.

StreetLight was used to identify the paths traffic currently takes to the following three destination “zones” shown in **Figure 9**:

- Zone 1: Hotel cluster in the vicinity of the I-81/I-90 interchange;
- Zone 2: Destiny USA super regional shopping center; and
- Zone 3: Pilot Travel Center.

The analysis focused on trips to these zones originating from I-81, north or south of its interchanges with I-481 (see **Figure 9**). A large percentage of the trips that arrive via I-81 from areas beyond the I-481 north and south interchanges were consumers who were traveling with the intention to stop at these destinations (e.g., visitors from Canada traveling to Destiny USA). Under the Community Grid Alternative, it is expected that these consumers would continue to frequent the zones at the same rates, because as detailed above, the travel times to those zones would not substantively change. However, a subcomponent of that traffic flow is composed of “pass-by” trips—consumers with a different ultimate destination in mind, who decide to stop and frequent the zone upon pass-by recognition of the business. Pass-by trips originating from I-81 north or south of its interchanges with I-481 would no longer frequent the zones because their origin and ultimate destination would find them re-routed on I-481. The SMTC regional model was used to determine the percentage of through trips under the Community Grid Alternative that would be rerouted from I-81 to I-481. This factor was then applied to the total estimated pass-by trips from I-81 under existing conditions to calculate the loss of pass-by trips that would be experienced in the future under the Community Grid Alternative.

To quantify the potential loss in consumer base, the percentage of pass-by trips expected to be “captured” as customers under existing and future conditions with the Community Grid Alternative were estimated. For Zones 2 and 3, pass-by trip capture rates from the ITE Trip Generation Handbook, 2nd Edition were applied to the projected pass-by traffic originating from I-81 north or south of its interchanges with I-481. The loss in consumer traffic for Zone 1/Hotels was estimated using a different metric because the ITE does not report pass-by capture rates for hotel uses. This is because ITE does not recognize hotels as a use sensitive to pass-by trips; unlike retail, where for example people see a grocery store and stop because they need a gallon of milk or they stop when seeing a gas station because they realize they need gas, nearly all travelers plan ahead for hotel stays. The Visit Syracuse report found that for overnight leisure trips, approximately 4 percent of domestic travelers and 8 percent of international travelers who stayed at hotels in Onondaga County were passing through Onondaga County en route to another destination. Based on this visitor profile, the analysis applied a weighted average of 5.3 percent pass-by capture for the Zone 1 hotel uses.

Table 6 presents a summary of the quantified estimates. Zone 1, representing the hotels, receives the highest percentages of consumer traffic from I-81 north and south of I-481 (10.7 percent and 14.5 percent, respectively). This is expected given the nature of the business use—a hotel draws customers largely from a population not living in the immediate area. Zone 2/Destiny USA receives substantially less of its consumer traffic from I-81 north and south of I-481 (2.9 percent

²¹ A trade area is the area within which a majority of customers or clients of a business are drawn.

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and 4.4 percent, respectively). Zone 3/Pilot Travel Center receives percentages similar to Zone 2/Destiny USA, at 4.2 percent from I-81 north of I-481, and 3.9 percent from south of I-481.

**Table 6
Percent of All Daily Trips Destined to Zones 1, 2, and 3**

Gate #	Description	Zone 1	Zone 2	Zone 3
		Hotels	Destiny USA	Pilot Travel Center
3	I-81 South of I-481	10.7%	3.9%	4.2%
13	I-81 North of I-481	14.5%	4.4%	3.9%
22	I-690 West of Hiawatha Blvd	12.9%	9.7%	4.1%
24	I-690 East of I-81	18.6%	9.1%	2.7%
27	I-90 West of I-81	23.8%	1.0%	5.3%
28	I-90 East of I-81	19.5%	2.8%	8.5%
	Other (including I-81 between north and south I-481 interchanges)		69.1%	71.2%
	Total	100.0%	100.0%	100.0%
	From I-81 (Outside 481)	25.2%	8.3%	8.1%
	% Pass-By Trip Capture	5.3%*	34.0%**	66.0%***
	Total Reduction in Customers (CG)	1.3%	2.8%	5.3%
<p>Notes: * This figure is based on data from the Visit Syracuse report which found that of all Syracuse leisure trip hotel stays, approximately 4 percent of domestic and 8 percent of international travelers were passing through Onondaga County en route to another destination. When accounting for the numbers of international vs. domestic travelers, the weighted average is approximately 5.3 percent. ** The ITE Trip Generation Handbook, 2nd Edition. The 34.0% value assumed for this analysis is the average pass-by capture rate for shopping centers of various sizes and is extremely conservative for a large regional shopping center like Destiny USA. ITE data shows a correlation between Average Pass-by Trip Percentage and Gross Leasable Area of a Shopping Center (820), with larger shopping centers having substantially fewer pass-by trips (ITE Trip Generation Handbook, 3rd Edition, Figure E.7, Shopping Center (820). See Attachment D. *** The ITE Trip Generation Handbook, 2nd Edition. Sources: Visit Syracuse. ITE Trip Generation Handbook, 2nd and 3rd editions.</p>				

As noted above, many trips to these zones that originate from north and south of I-481 had these zones as their original destination, and would continue to be captured under the Community Grid Alternative. To estimate potential loss in consumer base, the Visit Syracuse and ITE data were used to apply pass-by capture rates to the percentages from locations north and south of I-481 in order to derive the subset that are pass-by captures from these locations:

- **Zone 1:** Under existing conditions, an estimated 5.3 percent of the 25.2 percent of hotel customers traveling to Zone 1 on I-81 from points north and south of the I-481 interchanges did not intend to stay overnight in Syracuse. With the Community Grid Alternative, the resulting approximately 1.3 percent of hotel customers (5.3 percent of the 25.2 percent) would re-route to I-481, and would no longer be potential customers of the hotels in Zone 1.
- **Zone 2:** Under existing conditions, an estimated 34.0 percent of the 8.3 percent of Destiny USA visitors traveling to Zone 2 on I-81 from points north and south of the I-481 interchanges did not intend to stop at Destiny USA but did. With the Community Grid Alternative, the

resulting approximately 2.8 percent of Destiny USA visitors (34.0 percent of the 8.3 percent) would re-route to I-481 and would no longer be potential visitors to Zone 2.

- **Zone 3:** Under existing conditions, an estimated 66.0 percent of the 8.1 percent of Pilot Travel Center customers traveling to Zone 3 on I-81 from points north and south of the I-481 interchanges did not intend to stop at the Pilot Travel Center but did. With the Community Grid Alternative, the resulting approximately 5.3 percent of customers (66.0 percent of the 8.1 percent) would re-route to I-481 and would no longer be potential customers in Zone 3.

The following sections examine whether the estimated reductions in consumer trips could lead to the indirect displacement of business uses within these zones.

Zone 1

The Community Grid Alternative would alter existing travel patterns to the hotels near Interchange 25. **Table 6** above presents the percentage of daily travelers from I-81 north or south of I-481 that travel to Interchanges 23 through 25. While these hotels would still be accessible via the interstate highway system (I-90) and BL 81, they would not have direct access from I-81. To access these hotels from the south, travelers would take either BL 81 or I-81 to I-90. As noted above, the loss in consumer traffic for hotels was estimated based on visitor profiles because the ITE does not report pass-by capture rates for hotel uses. Because visitors are drawn to these hotels for a number of factors, and the change in travel time from the expected route of travel would be negligible, it is expected that the hotels would continue to capture a vast majority of the consumer trips originating from locations north and south of the I-481 interchanges. This is because a vast majority of hotel customers make reservations in advance of their arrival—i.e., they do not make last-minute decisions to stop based on visual recognition and “walk-in” bookings. The *Visit Syracuse* report indicates that only 10 percent of overnight domestic and 6 percent of overnight international travelers book their accommodations on the day of arrival. However, within this group, the vast majority are using online reservation platforms and apps to book last-minute hotel deals and comparison shop as opposed to being a “walk-in” guest or a true pass-by trip.

The location of the hotel along the expected route of travel is one factor among several that affects a traveler’s choice of hotels. Travelers can be expected to continue to stay at these hotels because the *de minimis* change in travel time between I-81 and BL-81 would have no effect on the overarching reason that the traveler chose to visit the greater Syracuse area or to stay at a particular hotel, which can be attributed to proximity to an attraction or airport, cost, amenities, brand loyalty, etc. This is especially true given hotel guests use of smartphones for online booking and wayfinding. There is a concentration of hotels at these interchanges and no comparable cluster of branded hotels along the re-routed I-481 corridor. As such, a pass-through traveler looking to stop and sleep would consider the options on route versus slightly off-route. Since smartphone wayfinding apps would show a minimal difference in travel time, travelers may very well decide to slightly re-route and stay at these hotels. From the north in particular, which is where the 8 percent of international pass-through travelers are coming from, the hotels would continue to be accessible via high-speed highway and the traveler could easily reconnect with I-81 after the hotel stay. For the following reasons, the Community Grid Alternative would not result in the indirect displacement of one or more of the hotels near Interchanges 23 and 25:

- **The hotels would continue to be strategically located within the market.** The hotels would continue to be well positioned to capture east-west through-trips on I-90 as well as southbound trips on I-81 connecting with I-90. In addition, the hotels would continue to be within close

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proximity to the airport, to Destiny USA that draws overnight visitors, and Downtown Syracuse.

- **The hotels’ national branding provides marketing capability to remain prominent regionally.** Online marketing combined with smart phone wayfinding reduces these hotels’ dependence on capturing consumer trips through visual recognition and at-the-moment visitation decisions.
- **The projected 1.3 percent decrease in consumer trips represents a very small portion of total bookings.** As detailed in Section 6-3-2.1.5 above, the 14 hotels within Zone 1 have higher performance metrics in terms of average occupancy rate and revPAR as compared to the Syracuse market as a whole, suggesting that a slight decrease in bookings would not jeopardize their viability.

Zone 2

Destiny USA is a major retail and entertainment destination that draws visitors from well beyond the Central Study Area. For “super” regional malls, which are destination-oriented and average over 1 million square feet of gross leasable area (GLA), consumer trade areas can extend 25 miles and consumer travel times can exceed 30 minutes.²² Destiny USA in their press materials cite a 2.5-hour trade area with the potential to reach 5.5 million people, with 15 percent of purchases made by Canadians.

Based on projected changes in travel time with the Community Grid Alternative, existing Destiny USA visitors who had Destiny USA as their trip purpose would continue to frequent the mall. There would be no change in overall average daily travel time to Destiny USA; average daily travel time from locations within the Syracuse Metropolitan Area to Destiny USA would be 14 to 16 minutes under the No Build and Community Grid Alternatives, which is less than the 20 minutes a typical consumer is willing to travel for clothing and other mall retailers. The locations that are predicted to experience increased travel times to Destiny USA are presented in **Table 7**. The travel time difference between the No Build and Community Grid Alternatives would be one minute or less from most locations. The exception is LaFayette, which is the farthest south in the study area and could experience an increase in travel time of five minutes in the PM peak hour.

**Table 7
Travel Times to Destiny USA**

Origin	Destination	Peak					
		AM Travel Time (minutes)			PM Travel Time (minutes)		
		No Build	CG	Difference	No Build	CG	Difference
Baldwinsville	Destiny USA	22	23	+1	20	21	+1
Downtown	Destiny USA	5	6	+1	5	6	+1
LaFayette	Destiny USA	16	20	+4	15	20	+5
Liverpool	Destiny USA	6	7	+1	6	7	+1

Source: Chapter 5, Transportation and Engineering Considerations.

²² U.S. Shopping-Center Classification and Characteristics, from ICSC Research and CoStar Realty Information, Inc., January 2017. Travel time data from ULI’s Shopping Development Center Handbook, Third Edition.

Based on the above assessment of travel time and volume changes, and the following considerations, the Community Grid Alternative is not expected to result in the indirect displacement of Destiny USA tenants:

- **Travel time changes would not substantially alter capture rates within Destiny USA’s consumer trade areas.** Destiny USA visitors who live in areas that are projected to have slightly longer travel times are expected to continue to frequent Destiny USA. There are no comparable retail and entertainment offerings within a closer drive time, and many consumer trips occur outside peak commuting hours such that most regular Destiny USA visitors would see little to no difference in travel time.
- **Destiny USA is not highly dependent upon “pass through” trips.** Destiny USA is recognized regionally, nationally, and internationally as a major retail and entertainment destination.²³ Visitors to retailers at Destiny USA make planned trips for purchases of “shopping goods,”²⁴ rather than stop-in visits for day-to-day convenience goods as there are a limited number of convenience retail stores within the center.²⁵ In this respect, the 2.8 percent reduction in pass-by customers would not substantively affect consumer visits.

Zone 3

As detailed above, with the Community Grid Alternative the Pilot Travel Center at Interchange 25 is projected to lose an estimated 5.3 percent of all trips (cars and trucks), including 22.8 percent of the interstate truck traffic traveling on I-81 (see **Table 8**). This truck stop would continue to serve pass-by customers from I-90 and trucks using BL-81 to deliver merchandise to nearby Destiny USA and the warehouse and industrial uses between existing I-81 Interchanges 24 and 25. However, this business’ high dependence on pass-by truck traffic from I-81 could affect its viability, and therefore the Pilot Travel Center is vulnerable to indirect displacement.

This analysis considers whether the potential displacement of a business could lead to further neighborhood disinvestment. Because it is not an “anchor” use, the potential displacement of the Pilot Travel Center would not have such effects. The location would continue to be viable for surrounding businesses, and the property could be redeveloped to other uses.

This analysis also considers the potential effects if a project displaces a use that generates a substantial amount of tax revenue, such that the loss of the use could compromise the fiscal health of affected taxing jurisdictions. This truck stop currently generates \$5,204, \$2,729, and \$26,965 in property taxes for Onondaga County, Town of Salina, and Liverpool Central School District, respectively. These taxes represent a very small percentage (less than one-tenth of one percent) of the overall tax levy for each taxing jurisdiction. Therefore, even if the Pilot Travel Center were to be displaced and the parcel remained undeveloped, it would not be considered an adverse effect on tax revenue.

²³ In the *Visit Syracuse* report, 47 percent of overnight domestic travelers and 65 percent of overnight international travelers surveyed visited Destiny USA while visiting Onondaga County.

²⁴ Shopping goods are usually higher value goods—such as clothing, electronics, or furniture—for which consumers compare quality and price at more than one store before making a purchase. Whereas convenience goods are usually lower value goods and food that are purchased frequently and immediately, often near the home or workplace, with little or no comparison shopping.

²⁵ <https://www.destinyusa.com/directory/>, last accessed 2/21/2020.

Table 8
Percent of Daily Truck Trips Destined to Zone 3

Gate #	Description	Zone 3
		Pilot Travel Center
3	I-81 South of I-481	11.4%
13	I-81 North of I-481	11.5%
22	I-690 West of Hiawatha Blvd	5.4%
24	I-690 East of I-81	3.2%
27	I-90 West of I-81	18.8%
28	I-90 East of I-81	19.1%
	Other (including I-81 between north and south I-481 interchanges)	30.7%
	Total	100.0%
	From I-81 (north of south of I-481)	22.8%

I-481 SOUTH STUDY AREA

POTENTIAL GROWTH INDUCEMENT

Because the I-481 South Study Area is where I-81 and BL-81 would intersect, there would be no substantive change in traffic volumes at the I-81 and I-481 interchange between the No Build and Community Grid Alternatives (see **Chapter 5, Transportation and Engineering Considerations**). North and southbound travelers on I-81 and BL-81 would continue to pass through this interchange, regardless of the ultimate destination. Therefore, the Community Grid Alternative would be unlikely to induce new highway-oriented retail and service business at this location.

POTENTIAL INDIRECT BUSINESS DISPLACEMENT

Interchange 15 was analyzed due to the potential increase in travel time to this location from points north under the Community Grid Alternative. This interchange is characterized by a small commercial area concentrated around the interchange. Businesses include McDonald’s, Circle K Gas Station, Dollar General, NAPA Auto Parts store, and M&T Bank. These convenience retail and restaurant uses primarily serve local residents and pass-by consumers traveling on I-81. Since no substantial changes in pass-by traffic are anticipated at this location, the Community Grid Alternative would not indirectly displace businesses at Interchange 15, or more broadly within the I-481 South Study Area.

I-481 EAST STUDY AREA

POTENTIAL GROWTH INDUCEMENT

The Community Grid Alternative would divert some of the existing north-south traffic from the existing I-81 corridor to I-481 (see **Chapter 5, Transportation and Engineering Considerations, Tables 5-51 and 5-52**). This could modestly increase the consumer base of, and

demand for, new highway-oriented development at the six existing I-481 interchanges. These are Interchange 2 at Jamesville Road, Interchange 3 at East Genesee Street, Interchange 4 at I-690, Interchange 5 at Kirkville Road, Interchange 6 at I-90, and Interchange 7 at Collamer Road. Any development near these interchanges would be subject to local zoning and approvals by the Town of DeWitt. These areas were analyzed because of their potential for increased traffic volume, and thus consumer base.

The area around Interchange 2 is primarily zoned R-1, which permits single-family residential uses. Therefore, substantial new development from the Community Grid Alternative would be unlikely in this area.

East Genesee Street at Interchange 3 is zoned Special Business Transitional to the east of I-481 and Business Transitional to the west of I-481. This area is currently characterized by highway commercial businesses, including retail centers, banks, and grocery stores. Land just to the north and south of East Genesee Street is zoned for single family residential. Therefore, any new development induced by the Community Grid Alternative would likely be infill development consisting of smaller-scale, highway-oriented retail and service business uses.

Interchange 4 east of I-481 is zoned Industrial, which permits a variety of uses including manufacturing, warehousing, retail, and vehicle service station uses. Any potential development adjacent to this interchange spurred by the Community Grid Alternative would likely consist of smaller-scale highway-oriented retail and service business uses. West of I-481 is primarily zoned for single-family residential uses. Therefore, new development is not anticipated in that area.

The area in the vicinity of Interchanges 5, 6, and 7 is zoned Hi-Tech, which allows for many different uses including office, industrial (manufacturing and distribution), hotels, nursing and senior care facilities, and retail. Drive-thru facilities are permitted by Special Permit. Therefore, the Community Grid Alternative could support new highway-oriented businesses in the vicinity of these interchanges.

POTENTIAL INDIRECT BUSINESS DISPLACEMENT

The Community Grid Alternative would increase traffic volume on I-481 between Interchanges 2 and 7. This increase in volume has the potential to increase the number of pass-by customers for convenience retail and restaurant uses in this area. This could have a positive economic benefit to these types of businesses. As such, no indirect business displacement is anticipated in the I-481 East Study Area.

I-481 NORTH STUDY AREA

POTENTIAL GROWTH INDUCEMENT

As discussed above, the Community Grid Alternative would divert some existing north-south traffic from the existing I-81 corridor to I-481 (see **Chapter 5, Transportation and Engineering Considerations**). This could modestly increase the desirability of new highway-oriented development (e.g. fast food retailers, gas stations) at two interchanges within the Town of Cicero: Interchange 8 at Northern Boulevard and Interchange 9 at I-81. Any development near these interchanges would be subject to local zoning and approvals by the Town of Cicero.

Zoning in the I-481 North Study Area allows for industrial and commercial uses around I-481 Interchange 8, residential and agricultural uses in many areas north or south of I-481 and east of I-81, and regional retail and commercial uses north of I-481 and west of I-81. The Community

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Grid Alternative could induce new highway-oriented retail and service business development at Interchange 8. However, any new development at Interchange 9 would be unlikely to be attributable to the Community Grid Alternative since there would not be a notable difference in traffic volume at that interchange between the No Build and Community Grid Alternatives.

POTENTIAL INDIRECT BUSINESS DISPLACEMENT

The Community Grid Alternative would increase traffic volume on proposed I-81 (existing I-481) between Interchanges 8 and 9. This increase in volume has the potential to increase the number of pass-by customers for convenience retail and restaurant uses in this area. This could have a positive economic benefit to these types of businesses. As such, no indirect business displacement is anticipated in the I-481 East Study Area.

H. SPECIFIC BUSINESS TYPES

FREIGHT (TRUCKING)

Under the Community Grid Alternative, I-481 would be designated I-81 and would carry a minimum of four lanes of through traffic. The alternative would not add additional access points to or from I-481 or I-81 in the North, South, or East Study Areas; thus, it would not change existing truck access to these study areas. The Community Grid Alternative would also include improvements to proposed I-81 (existing I-481) to increase capacity and flow.

Trucks and freight currently utilize proposed I-81 (existing I-481) to access points north and south of the City of Syracuse. The improvement of this interstate highway would facilitate the movement of goods through the study areas. It is anticipated that existing travel routes to access points north of the existing I-690 and I-81 interchange, such as the Syracuse Hancock International Airport, would be modified by drivers who would now access the airport from different routes, including I-90 and the re-designated I-81 (existing I-481).

The Community Grid Alternative may increase travel time for some freight trips. For the most part, the greatest change (4 to 6 minutes) would be for trucks with origins or destinations in the Central Study Area. As these are trips to and from specific locations, the change in travel time would not substantially impact freight operations in the Central Study Area. There would be less change in travel time to other freight hubs. Overall, the Community Grid Alternative would not impede freight movement in the study area.

MEDICAL

Medical uses would continue to be a destination use within the downtown area. Changes in travel times and patterns are not anticipated to affect medical uses within the study areas. Rather, improved connectivity to the surrounding neighborhoods would increase access to these locations, and as further discussed above, the Community Grid Alternative could induce complementary or supportive development on nearby underdeveloped parcels.

INSTITUTIONS OF HIGHER LEARNING

Educational uses would continue to be a destination use within the downtown area. Changes in travel times and patterns are not anticipated to substantially affect educational uses within the study areas. Rather, improved connectivity to the surrounding neighborhoods would increase

access to these locations, and the Community Grid Alternative would support complementary or supportive development on nearby underdeveloped parcels.

RETAIL

Retail would not be adversely affected as a result of traffic diversions or travel time changes associated with the Community Grid Alternative, and in some instances access to retail would improve. For example, in Downtown, increased pass-by traffic along local routes could improve business conditions of local retail establishments and attract additional establishments.

Regionally, although I-81 would be rerouted along the current I-481 alignment, highway connections to Destiny USA would continue to be available from all directions. As further discussed above, the Community Grid Alternative would not result in the indirect displacement of Destiny USA tenants.

HOTELS

Regionally, changes to travel patterns under the Community Grid Alternative are not anticipated to affect the hotel industry. Potential impacts to specific concentrations of hotels are discussed above.

Attachment A

Table A-1

2018 Jobs by North American Industry Classification System (NAICS) Industry Sector

NAICS Industry Sector	Central Study Area		I-481 North Study Area		I-481 South Study Area		I-481 East Study Area		Total Project Area	
	Count	Share	Count	Share	Count	Share	Count	Share	Count	Share
Agriculture, Forestry, Fishing and Hunting	0	0.0%	6	0.1%	0	0.0%	8	0.0%	14	0.0%
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Utilities	1,446	2.0%	139	1.5%	0	0.0%	9	0.0%	1,594	1.4%
Construction	1,611	2.2%	440	4.9%	186	3.8%	1,369	5.8%	3,606	3.2%
Manufacturing	2,222	3.0%	1,060	11.7%	258	5.3%	2,269	9.6%	5,809	5.2%
Wholesale Trade	2,157	2.9%	390	4.3%	173	3.5%	1,113	4.7%	3,833	3.4%
Retail Trade	4,733	6.4%	2,311	25.5%	338	6.9%	2,868	12.1%	10,250	9.2%
Transportation and Warehousing	889	1.2%	1,124	12.4%	178	3.6%	1,740	7.3%	3,931	3.5%
Information	1,414	1.9%	46	0.5%	4	0.1%	1,675	7.1%	3,139	2.8%
Finance and Insurance	2,300	3.1%	75	0.8%	36	0.7%	3,705	15.6%	6,116	5.5%
Real Estate and Rental and Leasing	1,200	1.6%	59	0.7%	84	1.7%	399	1.7%	1,742	1.6%
Professional, Scientific, and Technical Services	4,783	6.5%	1,632	18.0%	165	3.4%	1,995	8.4%	8,575	7.7%
Management of Companies and Enterprises	1,907	2.6%	5	0.1%	63	1.3%	732	3.1%	2,707	2.4%
Administration & Support, Waste Management and Remediation	5,098	6.9%	153	1.7%	219	4.5%	877	3.7%	6,347	5.7%
Educational Services	10,197	13.8%	59	0.7%	187	3.8%	545	2.3%	10,988	9.9%
Health Care and Social Assistance	18,344	24.9%	272	3.0%	2,404	49.1%	2,041	8.6%	23,061	20.7%
Arts, Entertainment, and Recreation	802	1.1%	100	1.1%	36	0.7%	200	0.8%	1,138	1.0%
Accommodation and Food Services	4,851	6.6%	692	7.6%	383	7.8%	1,188	5.0%	7,114	6.4%
Other Services (excluding Public Administration)	1,817	2.5%	336	3.7%	121	2.5%	990	4.2%	3,264	2.9%
Public Administration	7,987	10.8%	153	1.7%	62	1.3%	26	0.1%	8,228	7.4%
TOTAL	73,758	100%	9,052	100%	4,897	100%	23,749	100%	111,456	100%

Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7.

Table A-2

2018 Jobs by North American Industry Classification System (NAICS) Industry Sector

NAICS Industry Sector	City of Syracuse		Onondaga County		5-County Region	
	Count	Share	Count	Share	Count	Share
Agriculture, Forestry, Fishing and Hunting	0	0.0%	625	0.3%	2,147	0.7%
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	138	0.1%	193	0.1%
Utilities	1,441	1.6%	1,928	0.8%	4,062	1.3%
Construction	1,877	2.0%	9,692	4.2%	13,695	4.2%
Manufacturing	3,002	3.3%	18,538	8.0%	29,952	9.3%
Wholesale Trade	2,017	2.2%	12,404	5.3%	14,620	4.5%
Retail Trade	6,103	6.6%	24,672	10.6%	36,167	11.2%
Transportation and Warehousing	1,010	1.1%	10,163	4.4%	12,130	3.8%
Information	1,471	1.6%	4,372	1.9%	4,964	1.5%
Finance and Insurance	2,937	3.2%	9,651	4.2%	11,156	3.5%
Real Estate and Rental and Leasing	1,417	1.5%	3,341	1.4%	4,039	1.3%
Professional, Scientific, and Technical Services	4,812	5.2%	14,172	6.1%	16,897	5.2%
Management of Companies and Enterprises	2,081	2.3%	3,726	1.6%	4,101	1.3%
Administration & Support, Waste Management and Remediation	5,182	5.6%	12,290	5.3%	14,669	4.6%
Educational Services	18,221	19.7%	29,295	12.6%	44,576	13.8%
Health Care and Social Assistance	24,106	26.1%	39,736	17.1%	53,013	16.4%
Arts, Entertainment, and Recreation	863	0.9%	2,555	1.1%	3,386	1.1%
Accommodation and Food Services	5,674	6.1%	17,168	7.4%	26,016	8.1%
Other Services (excluding Public Administration)	2,159	2.3%	7,911	3.4%	10,855	3.4%
Public Administration	7,996	8.7%	9,941	4.3%	15,640	4.9%
TOTAL	92,369	100%	232,318	100%	322,278	100%

Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) Version 7.

Attachment B

Attachment C

Attachment D