

Exhibit 6

**Economic Development Report
Susan M. Christopherson, Ph.D.**

**Sources of Economic Development in the Finger Lakes Region:
The Critical Importance of Tourism and Perceptions of Place**

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1. Introduction

The proposal of Finger Lakes LPG Storage, LLC to build a new liquid petroleum gas (LPG) storage and transportation facility (Project) in the Town of Reading, New York, raises concerns about how increased industrialization of the western shore of Seneca Lake will affect economic development around the lake and in the wider Finger Lakes region.¹ In this report, I address that question by exploring the socio-economic context of the Project, with special attention to the branding of the region as a destination for tourism. I draw on 28 years of economic development research and analysis as a Professor of City and Regional Planning at Cornell University.² My assessment is based on review and analysis of: (1) academic research on the role of branding in tourism, particularly wine tourism; (2) reports on the economic impact of the Finger Lakes wine, vineyard, and tourism industries; (3) Quarterly Census of Employment and Work (QCEW) data for 2000 and 2013, for four counties surrounding Seneca Lake (Ontario, Schuyler, Seneca, and Yates); (4) historical information on the region and counties from *The Encyclopedia of New York State*; (5) websites for marketing and economic development organizations for the Finger Lakes region; (6) websites and publications on the wine industry and international wine regions; (7) websites describing academic training and technical assistance to the Finger Lakes wine industry; and (8) interviews with experts on the wine industry in the region, business operators, and economic development officials.

That research reveals a conscious and successful effort to leave behind traditional agriculture and manufacturing, to develop one of the most important wine production regions in the US (Asimov, 2011; 2013; Helper, 2012), and to transform that region into a center for agri-tourism and recreation. Regional growth now is increasingly dependent on investment by wineries and by hundreds of small businesses that serve tourists, who come to the region to experience one of the major glacial lakes in North America and its wine country environment. The character of the community created by those businesses—reflected in regional branding—in turn supports development of other industries with skilled workers, who demand a high quality of life. Because the industrialization of Seneca Lake is inconsistent with the community’s vision and plans, I conclude that construction of the Project is likely to damage the regional brand and therefore may have a significant adverse impact on economic development around the lake and in the wider Finger Lakes region.

2. The Regional Economic Development Trajectory

In this section, I summarize what is known about the direction of the vineyard, winery, and related tourism industries in the Finger Lakes economy and describe the value of these interrelated industries to the regional economy and to its economic development potential.

¹ The facility would be based on a 576-acre site in Schuyler County, NY, located in the town of Reading, about 2.5 miles north of the village of Watkins Glen. Surface facilities would extend uphill to the west, with compressors, brine ponds, bullet tanks, a flare, and distribution and transportation operations on the western side of Seneca Lake.

² My abbreviated curriculum vitae for 2000 to the present is attached as Appendix B to this report.

These industries have grown significantly in the counties surrounding Seneca Lake and in the broader Finger Lakes region since 2000, expanding employment and business activity even during the long, recent recession. The vineyards and wineries represent long-term investments in land and wine-making facilities. As they have expanded, they have supported additional employment growth in retail, food services and accommodations, construction, and other beverage manufacturing industries. This regional industry cluster arguably is poised to reach new heights, as evidenced by national hotel chain investment in Geneva and Watkins Glen and the prospect of international investment in new wineries. Despite all these positive signs, the continued growth of these interrelated industries, and of the regional economy, is dependent on maintaining a regional brand that emphasizes scenic beauty and lake-based leisure. Damage to the regional brand from the risks posed by the Project is likely to have a significant adverse effect on the growth trajectory in the region.

Since the 1980s, one set of industries in the Finger Lakes region, including the four counties surrounding Seneca Lake, has come to define the regional economy. These interrelated industries include: (1) specialized agriculture, particularly wine grape vineyards; (2) the wine-making industry, including tasting rooms and an expanding array of firms serving the vineyards and wineries; and (3) tourism businesses associated with the vineyards, wineries, and other lake-based leisure activities. The growth of these industries reflects the transformation of the Finger Lakes region and Seneca Lake counties from economies based largely on manufacturing to economies based on tourism, services, and specialized agriculture.

Although vineyards, wineries, and tourism have been growing in the region since the 1980s, they have become leading industries in Finger Lakes region and in the counties surrounding Seneca Lake since 2000. At that time, the State of New York and Finger Lakes counties, as well as numerous regional private sector organizations, began to make significant investments designed to alter the industrial composition of the region and the regional “brand.” The goals of this aggressive campaign have been three-fold: (1) to build an internationally recognized wine production region; (2) to attract tourists to this new “Finger Lakes wine country;” and (3) to use the appeal of an area of scenic beauty and abundant leisure activities to attract business investment and high-skilled workers (Tarleton and Robertson, 2014; White and Wynne, 2014). Location experts analyzing how quality of place affects corporate and labor decisions have recognized that: “In today’s highly competitive environment for talent, a compelling quality of place—a community’s attractiveness to existing and future residents and workers—is a competitive advantage” (Tarleton and Robertson, 2014).

The success of the economic development and re-branding efforts is evident from employment figures presented in Section 3 below, which demonstrate that, in Schuyler, Seneca, and Yates Counties, the field grain agricultural production and diversified manufacturing that characterized the local economy in the 1960s have been replaced by a combination of dairy farming, specialized agriculture (vineyards), and more recently, wineries and tourism (including accommodation and food services). Ontario County has a more diversified employment base, including knowledge-based employment related to the

photonics (laser optics and imaging) and other advanced technology industries (Eisenstadt, 2005), although the Seneca Lake counties generally have sought and attracted highly educated employees and entrepreneurs.

Both public officials and private sector leaders in these counties have marketed the entire region to a skilled workforce and year-round visitors, as a place offering scenic vistas, lake-based leisure activities, and the experience of small town life. That conscious decision on the part of policy makers and the business community to promote industries that can take advantage of the region's natural beauty, abundance of recreational options, and high quality of life has been expressed at the regional and county level. The mission statement of the Finger Lakes Regional Economic Development Council (REDC) provides:

The Finger Lakes region will accelerate its transformation to a diverse, knowledge-based economy by building on strengths that include renewable natural resources, a talented and highly educated workforce, a historic commitment to innovation and philanthropy, leadership as the state's top agricultural region ... enhancing the region's quality of life to attract and retain business and our citizens.

(<http://regionalcouncils.ny.gov/content/finger-lakes>). Similarly, the Schuyler County Countywide Comprehensive Plan (Schuyler Cnty. CWP) recognizes the increasingly important role of tourism and investment by small businesses:

The region's thriving tourism industry continues to be a strong economic driver for the County, towns and villages. Visitors come to our villages to indulge in the small-town atmosphere while enjoying the quality goods and services we offer. The visitor experience can be further enhanced with efforts to retain and attract local, niche businesses to the commercial cores of our villages.

(Schuyler Cnty. CWP (2014), <http://www.schuylercounty.us/DocumentCenter/View/2215>, p. 118). For more detail, on private and public investment, see Appendix A.

The investments made by private businesses in the region have represented long-term commitments and a model for building an economically sustainable regional economy. After all, as a report prepared for the New York State Empire Development Corporation notes:

By their very nature, wine and grapes are long-term investments and long-term employers: newly planted vineyards need four years to produce a harvest. Another year to three years are needed to turn those grapes into wine. Not only are these long-term investments but they are inherently tied to "place." Unlike manufacturing or service enterprises, New York vineyards, once

planted, cannot simply get up and move to another state which might offer a better business climate or tax incentives. . . . New York wine is about New York.

(MRK, 2005: 1). The state-level branding illustrated in the quoted passage in turn has supported rapid local and regional economic growth.

The Stonebridge (2014) study of the economic impact of the wine and grape industry in New York provides information on the recent expansion of the winery industry. Since 2008, the number of wineries in New York has increased from 240 to 320, and the number of winery satellite stores has grown from 27 to 52. Much of this increase has occurred in the Finger Lakes region.

The Northern Grapes (Tuck and Gartner, 2013) analysis states that growth in New York wineries is expected to continue. Of the wineries they interviewed, 70 percent indicated that they intended to expand their vineyards. In addition, recent indications of interest from international investors in the development of wineries in the Finger Lakes suggest that property values and tax revenues will be increasing in the region (Dawson, 2014).

Though it still exists in some places in the region, heavy industry is less and less part of the vision for the region's future. The proposed butane and propane storage at the Reading site is at odds with the direction of the contemporary regional economy and potentially threatens its continued successful development. The creeping industrialization up the west side of Seneca Lake—from salt manufacturing, to natural gas storage, and potentially to LPG storage—endangers the hard-fought-for brand (for world-class wines in a world-class natural environment) that is central to the region's economic development future.

3. Wine Production in the Finger Lakes Region and around Seneca Lake

According to the state-supported New York Wine and Grape Foundation (<http://www.newyorkwines.org>), there are 133 wineries and tasting rooms in the Finger Lakes region, with approximately 40 located on Seneca Lake. Of these wineries, 35 collaborate as part of the Seneca Lake Wine Trail (<http://www.senecalakewine.com>), a non-profit organization formed in 1986. The counties surrounding Seneca Lake constitute one of the two major concentrations of the wine industry in New York State, with 113 wineries in Ontario, Seneca, Schuyler, and Yates Counties. The wineries in these four counties account for 35 percent of the total (320) wineries and tasting rooms in New York State. The 40 wineries located on Seneca Lake represent 12.5 percent of the total wineries in the state.

The Finger Lakes region is among the top wine-producing regions in the US. The new, more specialized high-end wines have been built on an older base of growers and acreage that supplied Taylor Wine Company, Constellation, and Hermann Wiemer Vineyard. Indeed, the cultivation of grapes and production of wine dates back as far as the 17th

century.³ The attraction of the region for vintners is its unusual, favorable ‘microclimates’ for growing cold-sensitive grapes.

Many US states with cold climates produce cold-hardy grape varieties. New York is able to grow a wider range of grape varieties, however, because of the microclimates adjacent to Seneca Lake. One area on the eastern side of the Lake is referred to as the “banana belt” because of its warmer winter temperatures, produced by warm breezes across the deep lake, which because of its depth does not freeze in the winter.

The Finger Lakes wineries are now considered the primary producers of Riesling wines in the US (Asimov, 2013; Patterson, 2003). According to a wine expert writing in the early 2000s: “[T]he New World’s best Rieslings, hands down, come from the Finger Lakes region of upstate New York — in my book, the only ones that give the Germans a run for their money” (Patterson, 2003).

The Finger Lakes region’s specialization in cold-sensitive grapes, the increasing popularity of Riesling in the US, and the award-winning caliber of the wines have been stimulating interest from international investors and producing a reputation as an international center for wine production. In 2014, New York State was named “Wine Region of the Year” by *Wine Enthusiast* magazine for its wine, restaurants and tourism opportunities (<http://www.winemag.com/Web-2014/Announcing-Wine-Enthusiasts-2014-Wine-Star-Award-Winners/index.php/slide/Wine-Region-of-the-Year/cparticle/3>). Seneca Lake wineries are at the heart of this region, in quantity of wine produced as well as in quality, and they have received many awards for their wines (<http://www.senecalakewine.com/seneca-lake/winery-awards.html>).

Since 2000, the Seneca Lake wineries have been characterized by two types of wine production:

- A large number of small and very small wineries, selling directly to consumers and some restaurants and retailers, primarily in their local regions. These wineries tend to produce a large variety of table wines, from *Vitis vinifera*, hybrids and native grapes. These wineries tend to be visitor-driven, at times called “destination wineries.”
- A small number of small wineries producing primarily *Vitis vinifera* grapes. While direct sales are also critical to these wineries, some will have national third-party distributors for as much as 30-50 percent of their sales.

4. The Key Role of Tourism in Economic Development of the Finger Lakes Region

Tourism is central to the growth of the Finger Lakes wine region. According to a study of wine production in cold climate states (Tuck and Gartner, 2014), New York wineries are

³ For more detail, see Section 2.4 of the Community Character Analysis prepared by Harvey Flad, Ph.D., for this proceeding.

more likely to operate a tasting room than wineries in other states producing cold-sensitive grapes. According to Miguel Gómez, the Ruth and William Morgan Assistant Professor in the Charles H. Dyson School of Applied Economics and Management at Cornell University, and an expert on the New York wine industry: “On average, nearly 60 percent of New York wine sales occur during visits to tasting rooms. . . . For this reason, they play a strategic role in the overall business and marketing strategies of New York state wineries” (Garris, 2014). The tasting rooms draw in tourists already in the region for other leisure activities as well as new tourists interested particularly in wine-making or who are wine enthusiasts.

The Finger Lakes wineries have worked to expand tourism in New York, and the wineries in turn depend on a flow of tourists to sustain their businesses. According to one analysis of the economic impact of the wine and grape industry:

New York wineries and their satellite facilities received more than 5.29 million visits in 2012, spending more than \$401 million, compared with 4.98 million visitors spending \$376 million in 2008—and 4.14 million wine related tourists in 2004, generating \$312 million in tourism related spending. Tourism is an important facet of the local economy, impacting several different industries, from wineries to hotels and restaurants, retailing and transportation. Winery tourism contributes over 6,400 jobs to the state, for a total of more than \$213 million in wages, compared with 6,000 jobs in 2008 and about 5,000 in 2004.

(Stonebridge, 2014: 7).

Another indicator of the importance of tourism to the regional economy is growth in hotel occupancy taxes in the small cities in the region. In addition to Bed and Breakfast establishments serving visitors to the region, major hotel chains have begun to make investments in cities such as Watkins Glen and Geneva. Between 2010 and 2013, occupancy taxes in Geneva hotels grew from \$178,000 to \$198,000. A total of \$203,000 is anticipated for 2014. These taxes frequently are used to support tourism activities, such as community festivals, and marketing. They are re-invested to increase visitor knowledge of the region’s attractions.⁴

Also attesting to the importance of tourism to regional economic development is the presence of multiple marketing organizations, supported by the wineries. These organizations include the Cayuga Lake Wine Trail; the Seneca Lake Wine Trail; the Finger Lakes Wine Alliance; and Finger Lakes Wine Country. The wineries’ goal is to establish the Finger Lakes as one of the nation’s primary wine production and tourism regions. The wine and tourism industries are also supported by county-level tourism promotion agencies. All of these organizations and agencies promote a consistent brand for the region, focused on wineries and tourism in a scenic lakeside leisure setting.

⁴ Interview: Sage Gerling, Director of the Office of Neighborhood Initiatives, Geneva, NY, January 6, 2015.

Tourism is a particularly important industry in Schuyler County, which hosts more than 1.5 million visitors a year. This is an extraordinary number of visitors for a county that ranks as the second smallest county in New York State and whose resident population numbers under 19,000 residents. The 2013 annual report of the Schuyler County Partnership for Economic Development describes numerous projects supportive of tourism: main street redevelopment, improvement of signage, community gateway development, and Marina development for Seneca-Lake-based leisure activities (Schuyler County Partnership for Economic Development, 2013). The County's Hazard Mitigation Plan states: "Because Schuyler County's economy relies heavily on tourism and agriculture, numerous efforts are underway to preserve the county's scenic rural character and productive agricultural sector" (Schuyler County Emergency Services, 2008: 5). The Project moves the county in the opposite direction, potentially under-cutting both public and private sector investments in re-branding the region.

5. The Critical Role of Branding to Tourism and Regional Economic Development

The growth and expansion of the Finger Lakes economy and of its inter-related wine and tourism industries is deeply dependent on potential visitors' perception of the region. Visitors, in fact, substantially sustain the emerging high-value wine industry.

The US Travel Association (USTA) highlighted the Finger Lakes region in an undated case study of how tourism promotion can also promote the broader economic development objectives of a region and a state. Developing a region's travel-related assets serves the dual purpose of attracting both more visitors and more businesses—a win-win proposition for a local economy. The USTA notes that more than one fifth (22 percent) of corporate executives surveyed in 2013 cited "quality of life concerns" as the primary reason for relocating a facility, ahead of factors such as healthcare costs (19 percent), infrastructure (19 percent) and labor availability (17 percent).

Likewise, *Forbes* magazine includes cultural and recreational opportunities among other critical factors, such as job and income growth, when ranking its "Best Places for Business and Careers." Not surprisingly, young professionals in particular favor locations offering diverse activities such as outdoor recreation, arts, and cultural attractions, when deciding where to start their careers (<http://www.forbes.com/sites/kurtbadenhausen/2014/07/23/best-places-for-business-2014-behind-the-numbers/>).

My own research into workforce development in the Southern Tier (Christopherson et al., 2007) reinforced this finding. Our interviews and focus groups identified four key factors in attracting high- and mid-level skilled workers to the Southern Tier:

- Previous experience with the area. The mostly likely candidates to take jobs had family connections in Upstate New York or had attended school in the Upstate area. Many of our focus group participants had undergraduate or graduate degrees from an Upstate University.
- The quality of life. Our interviewees identified the "sense of community," outdoor sports (hunting, fishing, hiking, running, golf), and short commute times to work as

significant advantages.

- The quality of schools and educational opportunities at every level, from primary school through college.
- The quality and range of cultural opportunities, which was noted as exceptional for a region of this population size.

Overall, the evidence indicates that investments in regional tourism facilities, businesses, and amenities will also pay off by attracting businesses and workers looking for a high quality of life. By contrast, the construction of facilities that reduce the attractiveness of the area are likely to impair the potential for regional economic development.

6. The Impact of the Vineyard, Winery and Tourism Industries on Employment and Taxes in the Finger Lakes and the Four Counties Surrounding Seneca Lake

The tourism and wine and grape industries are contributing substantially to the regional and state economy. Outside of the New York City, Long Island and Hudson Valley Corridor, the Finger Lakes region is the major regional contributor to traveler spending in the State of New York, with five percent of total spending. Finger Lakes traveler spending is equal to that in the Hudson Valley (Oxford Tourism Economics, 2012:24). Tourism in the Finger Lakes counties is a \$2.8 billion industry supporting approximately 58,000 jobs (ibid.: 31). Tourism contributed almost \$200 million in local taxes and \$152 million in state taxes (ibid.: 32). Among all the Finger Lakes counties, Schuyler County, where the LPG facility is proposed, is the most dependent on tourism employment, with 12.4 percent of total employment sustained by visitors (ibid.: 41).

Several studies of the economic impact of the wine and grape industries in New York have been conducted since 2005. These studies examine the New York State those industries from different perspectives—some, for example, include the broader grape growing industry, rather than focusing only on wine grapes. Although they use different methods and focus on different aspects of the interrelated industries, these economic analyses concur in showing dramatic growth in enterprises and employment across the grape production and winery industries in the region.

The most extensive of the recent economic analyses, conducted for the New York Wine and Grape Foundation, pegs the economic impact of the entire wine and grape industry, including wineries, associated suppliers, and tourism at \$4.6 billion per year (Stonebridge, 2014). This study includes the broader table grape and grape juice industry and generally does not break out the winery industry, but the study's executive summary indicates important trends in the wine production and winery industries in New York:

The last study reported on data for 2008, as the “Great Recession” was building. The increased impact reflects the growth since 2008 in both the volume and value of wine sold in New York. We have also succeeded in capturing more supplier sectors (such as warehousing, trucking, ports, marketing services, vineyard maintenance), and more tourism related expenditures—the latter

based on state studies—and better information on sales and property taxes. Over this period, the industry has expanded investment in these sectors, and in infrastructure development and construction. New York wines also represent a larger share of the wines sold in New York State than was true in 2008, responding to the industry’s persistent marketing efforts

(Stonebridge 2014). Stonebridge estimates that the 320 New York wineries employ the equivalent of 3,600 full time workers. Since 2008, the number of full time workers as well as the number of owner operators has grown significantly in response to increasing demand for direct services and sales. This growth is directly linked to increasing tourist expenditures in the wine regions, especially the Finger Lakes.

Looking at federal employment statistics for the four counties directly surrounding Seneca Lake (Seneca, Schuyler, Ontario, and Yates), the impact of the wine industries on the county economies is easily visible.⁵ Using QCEW data it is possible to get an approximation of changes in employment in the Seneca Lake counties, though the available numbers are likely underestimated because they do not count self-employed workers. The analysis uses NAICS 72 (consisting of 721: Accommodations, and 722: Food Services and Drinking Places) as the generally-accepted surrogate to measure employment change in tourism, and NAICS 312 to measure employment change in Beverage Product Manufacturing (which includes the wine industry). For ease of reference below, I refer to “Accommodations and Food” and “Beverage Manufacturing.”

In Schuyler County, total private sector employment grew 15 percent between 2000 and 2013. Although the real numbers are small, with 662 people employed in Accommodations and Food in 2013, this industry category grew by 47 percent in Schuyler since 2000. Beverage Manufacturing employment grew at an even faster pace, by 125 percent, attesting to the role of winery employment in a county where other types of employment have not shown rapid growth.

In Seneca County, private sector employment grew by 7.5 percent between 2000 and 2013. After declining in the early to mid-2000s, employment numbers have begun to rise, and employment in the Accommodation and Food is now at 97 percent of its total number in 2000 (932 jobs). Employment in Beverage Manufacturing increased from 102 in 2000 to 420 in 2013, an increase of 312%.

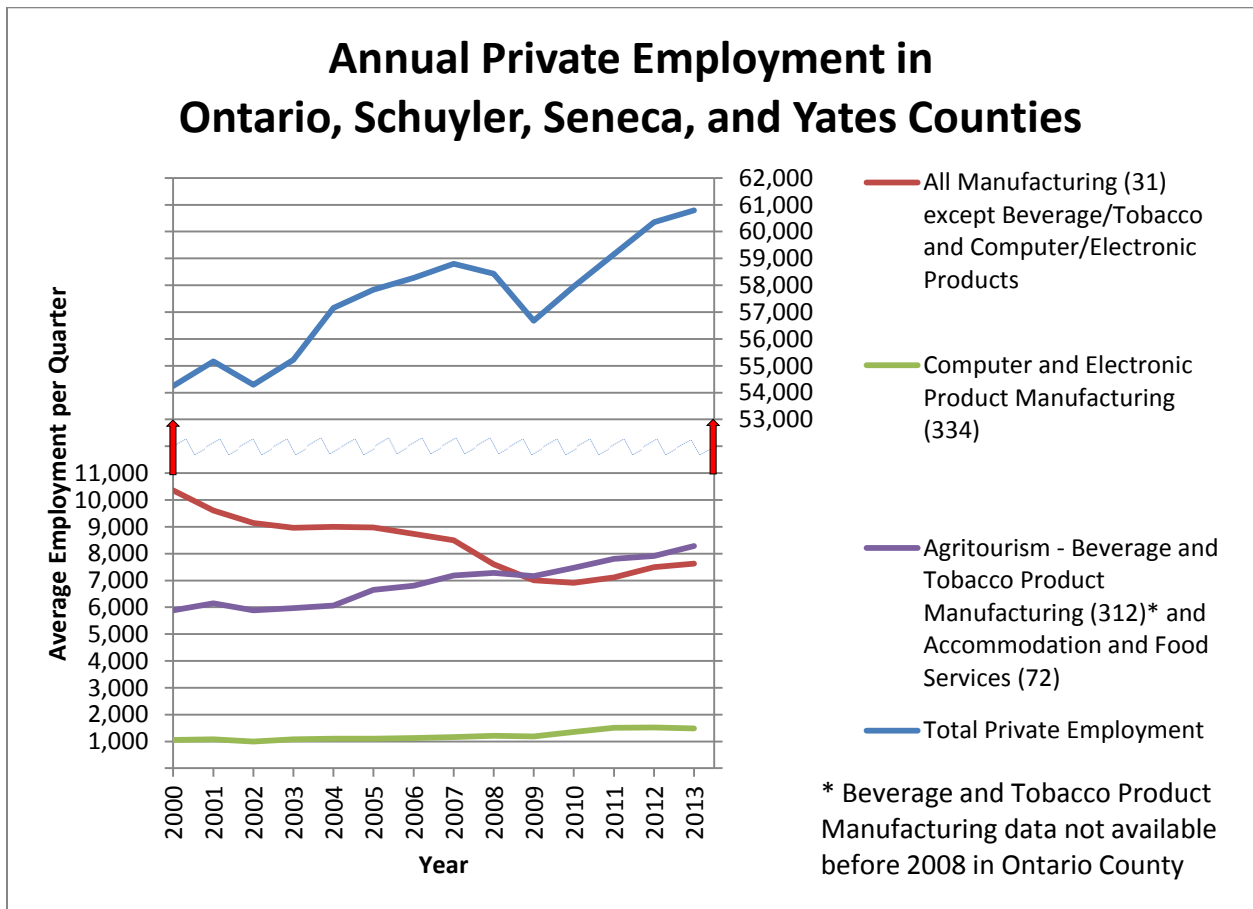
In Ontario County, one of the most prosperous counties in Upstate New York, private sector employment grew by 12 percent between 2000 and 2013. Beverage Manufacturing was not present in county employment figures until 2008, and in 2013 had reached 286 jobs. Accommodation and Food grew by 33 percent between 2000 and 2013.

⁵ This analysis uses data from QCEW, a federal-state cooperative program that collects employment and wage information for workers covered by State unemployment insurance laws, and for Federal workers covered by the Unemployment Compensation for Federal Employees program. The data are made available by the U.S. Bureau of Labor Statistics.

In Yates County, private employment has increased 18 percent during the 2000 to 2013 period. Employment in Accommodation and Food rose by 21 percent. Employment in Beverage Manufacturing rose 145 percent to 324 jobs in 2013.

As is shown in Figure 1, below, the winery and tourism industries are making a positive contribution to employment in these counties, in contrast with traditional manufacturing.

Figure 1



Much of this employment growth comes from expenditures by tourists, who visit the Finger Lakes and the Seneca Lake counties in response to the regional brand.

7. Conclusion

Finger Lakes vineyard, winery, and tourism firms have made long-term investments in this region, but they must have a stable business environment to reach their full potential as contributors to a healthy and increasingly vibrant regional economy. That environment

depends on a continuous positive image for New York wine country, nationally and internationally.

The wineries have been leaders in branding the region as a tourist mecca. This is evident from a look at their website (<http://www.senecalakewine.com/communities/activities-attractions.html>), which advertises a variety of regional attractions and services for tourists throughout the full year. Conversely, damage to the Wine Trail brand could impact a wide range of hotels, restaurants, and other businesses that directly or indirectly rely on regional wine tourism.

The Seneca Lake vineyards and wineries already face significant challenges, ranging from finding skilled labor to unpredictable weather. Particularly crucial is access to financial capital—to build tasting rooms, winery facilities, and vineyard operations. Access to that capital depends on a stable brand and low risks from contradictory uses of the Finger Lakes landscape.

Based on my experience conducting economic development research in New York, it is my opinion that construction and operation of an LPG storage facility on Seneca Lake will have significant unmitigated adverse impacts on the region's economic success. The prominent growth industries in the area—vineyards, wineries, and tourism—are heavily dependent on a regional “brand” that features a scenic landscape and specialized agriculture. That brand invokes a very specific picture of the Finger Lakes, and the continuing economic success of the region depends upon consistency of visitor perceptions with the image projected by the wineries. The incompatibility of the Project with the surrounding natural landscape and lake-based recreation tarnishes that image, and presents risks to the business prospects of many regional firms—including, but not restricted to, the 40 wineries along Seneca Lake. Even a minor industrial accident could do serious brand damage and dampen investment in New York wine country.

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Tourism Branding: Communities in Action
Liping A. Cai, William C. Gartner, and Ana María Munar (ed.) 2009. *Tourism Branding: Communities in Action (Bridging Tourism Theory and Practice, Volume 1)*. Emerald Group Publishing Limited, pp.iii. Available at: <http://www.emeraldinsight.com/doi/abs/10.1108/S2042-1443%282009%290000001023>. Accessed January 11, 2015.

White, D and D. Wynne. 2014. "The Regional Impact of Quality of Life on Entrepreneurial Decisions." *Area Development*. Available at: <http://www.areadevelopment.com/business-climate/Q2-2014/quality-of-life-impacts-entrepreneurial-decisions-28827151.shtml>. Accessed January 5, 2015.

Appendix A

Private and Public Investment in the Regional Industries

Appendix A

Private and Public Investment in the Regional Industries

The development of the strong vineyard, winery and tourism industries in the Finger Lakes region has benefited from significant private and public investment. There has been significant private investment especially since 2000 in building and marketing these interrelated industries. The US Travel Association (2013) indicates that in 2000, the first year of funding, the Finger Lakes Wine Country Marketing Association invested \$156,000 in media and marketing. The yearly budget in 2012 was 873,000 (U.S. Travel Association: 16)

New York State has taken an active role in supporting the development of the Finger Lakes wine industry. The most prominent example of this role is the Farm Winery Act of 1976, which enabled New York's grape producers to find a new, higher value market for their crops, as demand for traditional juice products and traditional Concord grape wines diminished. The Farm Winery Act enabled small wineries to sell their product directly to consumers, retailers and restaurants in the state.

Since the passage of the Farm Winery Act in the 1970s, the number of wineries in New York increased dramatically each decade (MFK, 2005). The 1980s saw an additional 69 wineries established in the state, more than doubling the number of established wineries. In the 1990s, 74 additional wineries were established in the state, and 30 were added in the early 2000s. This growth has been almost entirely in the development of "farm wineries."

Legislation to allow out-of-state shipping has also been significant in building the industry in New York. A 2004 survey found that 23 percent of the more than 4 million visitors to New York wineries in 2003 came from other states. The direct shipment legislation facilitated sales to these visitors and had a major impact on New York's small wineries. (MFK, 2005: 12)

The New York Wine & Grape Foundation was created by State legislation in 1985, during an economic crisis in the grape and wine industry, as a private not-for-profit statewide trade organization to support the industry through promotion and research.

Along with the New York state legislature, Governor Andrew Cuomo has encouraged legislation, regulatory reform and promotion programs to support New York's and the Finger Lakes wine industry. A "One Stop Shop" office was formed to handle any and all questions from the industry about government policies and regulations. The State of New York has made significant efforts and investments to support the vineyard, winery, and associated tourism industries in New York State because of their economic development benefits.

Appendix B

**Abbreviated Curriculum Vita of
Susan M. Christopherson, Ph.D.**

Abbreviated Curriculum Vitae¹
December 2014

SUSAN M. CHRISTOPHERSON

Professor and Chair, Department of City and Regional Planning
Cornell University
106 West Sibley Hall
Ithaca, New York 14850
Phone: 607-255-8772
Fax: 607-255-1971
Email: smc23@cornell.edu

Susan Christopherson is a Professor and current chair in the Department of City and Regional Planning at Cornell University. She is a geographer (Ph.D. UC Berkeley 1983) whose career has been based on a commitment to the integration of scholarly work and public engagement.

Her research interests are diverse, but focus on economic policy, especially its spatial dimensions. Much of her research is comparative and she has published a series of articles and a book on how different market governance regimes influence regional development. Since 2010, her funded research, publications, and public engagement have focused on the issue of energy transitions and the economic and social effects of shale gas and oil development.

Susan Christopherson's public engagement has spanned arenas from the local to the global. She has acted as a consultant to the Organization for Economic Cooperation and Development and to the United Nations Conference on Trade and Development as well as to national, state, and local governments in the US and Canada. She was recently a member of a US National Academy of Science committee on the identification and governance of shale gas development.

EDUCATION

Ph.D.	University of California – Berkeley	Geography	1983
B.A.	University of Minnesota – Minneapolis	Urban Studies	1972

TEACHING

Economic Geography; Urban Theory; Economic Development; Urban Sustainability and Energy Transitions.

AWARDS and HONORS

Writing Awards

Best Book Award, Regional Studies Association for *Remaking the Region, Labor, Power and Firm Strategies in the Knowledge Economy*. Awarded September 2009.

Three books in which I have articles have won book awards: Gray, L. and Seeber, R. (eds.) *Under the Stars: Essays on Labor Relations in Arts and Entertainment*, Ithaca, NY: Cornell University Press, 1995, which was recognized as a “Noteworthy Book in Industrial Relations and Labor Economics”; A. Pike (ed.) *Whither Regional Studies?* New York: Routledge, 2009, which was awarded the Best Book Award 2010 by the Regional Studies

¹ This abbreviated CV reports on my activities from 2000 forward. A complete CV documenting my career activities is available on request.

Association and Mark Deuze (ed.) *Managing Media*, which was awarded the 2011 Pickard award for best book by the Association for Journalism and Media Education.

Professorships and Other Awards

Hallsworth Professorship, University of Manchester, Manchester England. Awarded in the Department of Geography. 2014-15. (Visit will take place in Spring 2015).

J. Thomas Clark Professorship for Entrepreneurship and Personal Enterprise, Cornell University 2006-2011

Cornell Institute for Social Sciences Research Team Award for a 3-year project on Persistent Poverty and Upward Mobility, 2008-2011

Queens University Distinguished Lectureship, November 20-25, 2009, Kingston, Ontario, Canada

Visiting Scholar, The Centre for Urban and Regional Development Studies at Newcastle University, Newcastle Upon Tyne, January, 2009

Bousfield Distinguished Visitor in Planning and Geography, University of Toronto (I gave a series of seminars and public lectures at the University of Toronto in September, 2007 and again in March, 2008.)

Cornell University, Community and Regional Development Institute Award for Faculty Contribution to Community and Economic Vitality, awarded November 2007

Visiting Fellow, St Catherine's College, Cambridge University Spring semester, 2007

Visiting Distinguished Fellow, School of Management, Kings College, London
October 2004

PUBLICATIONS

BOOKS

I have a book contract with the Everett Parker series (devoted to books that intersect communications and the public interest), published jointly by Fordham University Press and Oxford University Press. The book, with a working title of *Lessons from the Search for Hollywood East* brings together and expands on my long-time work on the creative workforce in entertainment media and economic development policy. The book will be published in 2015.

Remaking the Region: Power, Labor, and Firm Strategies in the Knowledge Economy (with Jennifer Clark). New York: Routledge Press (Special Series on the New Economic Geography), 2007. Paperback edition, 2009.

MONOGRAPHS

Net-Working: Patterns and Policies for the New Media Industry (with Rosemary Batt, Danielle Van Jaarsveld and Ned Rightor) Washington: Economic Policy Institute, 2001.

NEW YORK'S BIG PICTURE: Assessing New York's Role in Media Production (with Lois Gray, Damone Richardson, Maria Figueroa, and Ned Rightor). The New York Film, Television, and Commercial Initiative and New York NY: School of Industrial and Labor Relations, Cornell University, 2006.

ARTICLES FOR PUBLIC POLICY JOURNALS (Editor reviewed)

"Frack or Bust: Shale Gas Extraction Brings Local Planning Challenges" 2012. in *Planning* (The Magazine of the American Planning Association) Vol. 78, No.4 (April) pp.8-13 (with Tom Knipe and David West).

“Not So Fast – Why a Transportation System Designed for Wal-Mart Limits Our Export Economy,” in *Democracy, A Journal of Ideas*. (Forthcoming 2014)

“Manufacturing: Up from the Ashes” in *Democracy, A Journal of Ideas*. 2009. Special Issue on Innovation, September 9, 2009. Available online at: <http://www.democracyjournal.org/index.php>

Building Phoenix Industries in Our Old Industrial Cities, The Smith Institute Policy Reports October 2009. Available online at: <http://www.smith-institute.org.uk/default.htm> London: The Smith Institute.

ARTICLES IN REFEREED JOURNALS: (PUBLISHED, OR ACCEPTED AND FORTHCOMING)

“Risks and Risk Governance in Unconventional Shale Gas Development,” *Environmental Science and Technology* 2014: 48(15): 8289–8297 (with members of The National Academy of Science Panel).

“Reindustrialising regions: rebuilding the manufacturing economy?,” *Cambridge Journal of Regions, Economy and Society* 2014: 7(3): 351-358 (with Ron Martin; Peter Sunley; Peter Tyler) Special introduction

“NIMBYs or Concerned Citizens? How Communities Evaluate the Costs and Benefits of Shale Oil and Gas Development ,” *Progressive Planning* 2014 : 194 (Winter): 40-49 (with Ned Rightor).

“Hollywood in Decline? US Film and Television Producers Beyond the Era of Fiscal Crisis,” *Cambridge Journal of Regions, Economy and Society* 2013: 6(1) (March): 141-158.

“Financialization: Roots and Repercussions,” *Cambridge Journal of Regions, Economy and Society*. 2013: 6: 351-357 (with Ron Martin and Jane Pollard) Special issue editorial introduction.

“Job Creation Strategies to Accelerate the Return of U.S. Manufacturing,” *Progressive Planning* 2012: 190 (Winter): 13-17.

“Local Consequences of Natural Gas Drilling in the US Marcellus Shale,” *International Journal of City and Town Management* 2012: 2(4): 350-368 (with Ned Rightor).

“Never Let a Good Crisis Go to Waste: Re-imagining Resilience in the Light of the Great Recession,” *Critical Planning Theory* 2010: 17 (Summer): 108-123.

“Limits to ‘The Learning Region’ What University-Centered Economic Development Can (and Cannot) Do to Create Knowledge-based Regional Economies,” *Local Economy* 2010: 25.2 (May): 120-130 (with Jennifer Clark).

“Regional Resilience: Theoretical and Empirical Perspectives” 2010. *Cambridge Journal of Regions, Economy and Society* Volume 3, No. 1: 3-10 (with Jonathan Michie and Peter Tyler) (reviewed by the editorial board).

“Afterword: Contextualized Comparison in Local and Regional Economic Development: Are United States Perspectives and Approaches Distinctive?” *Regional Studies* 2010: 42(2) (March): 229-233.

“The Creative Economy as “Big Business”: Evaluating State Strategies to Lure Film Makers,” Special issue on The Creative Economy and Economic Development, *Journal of Planning Education and Research* 2010: 29(3) (March): 336-352 (with Ned Rightor).

“Transforming Work: New Forms Of Employment And Their Regulation,” *Cambridge Journal of Regions, Economy and Society*, 2009: 2(3) (November): 335-342. (with Linda McDowell) (reviewed by editorial board).

“Integrating Investment and Equity: A Critical Regionalist Agenda for a Progressive Regionalism” in *Journal of Planning Education and Research*, 2009, vol. 28 (March): 341 – 354 (with Jennifer Clark).

“Beyond the Self-expressive Creative Worker, An Industry Perspective on Entertainment Media,” in *Theory, Culture and Society*, 2008 Vol. 25 (7-8): 73-95.

“The World is Not Flat: Putting Globalization in its Place,” (with Harry Garretsen and Ron Martin) in *Cambridge Journal of Regions, Economy and Society*, 2008 1 (3): 343-349, (reviewed by editorial board).

“Innovation, Networks and Knowledge Exchange” 2008. (with Michael Kitson and Jonathan Michie) in *Cambridge Journal of Regions, Economy and Society*, 1 (1): 165-173, (reviewed by editorial board).

"Power in Firm Networks: What it Means for Regional Innovation Systems" in *Regional Studies* Volume 41 Issue 9, December 2007:1223-1236 (with Jennifer Clark).

"Barriers to 'U.S. Style' Lean Retailing: The Case of Wal-Mart's Failure in Germany" in *The Journal of Economic Geography*. Volume 7 Number 4, July 2007: pp 451-469.

“The Politics of Firm Networks: How Large Firm Power Limits Small Firm Innovation” (with Jennifer Clark) in *Geoforum* Volume 40 Issue 10, January 2007.

"Placing the Creative Economy: Scale, Politics and the Material" (with Norma Rantisi and Deborah Leslie) in *Environment and Planning A* Volume 38 Number 10, January 2006.

“Behind the Scenes: How Transnational Firms are Constructing a New International Division of Media Labor” in *Geoforum* Volume 37 Issue 5, September 2006: pp 739-751.

“Neither Global Nor Standard: Corporate Strategies in the New Era Of Labor Standards” (with Nathan Lillie) in *Environment and Planning A* Volume 20 Number 6, November 2005.

“After the Boom’: Entrepreneurial and Professional Paths in New Media Work” (with Danielle Van Jaarsveld) in Special Issue of *The International Journal of Cultural Policy* Volume 11 Number 1, 2005.

“Divergent Worlds, Sustaining Careers in the Creative Economy” in *Review of Policy Research* Volume 21 Number 4, 2004: pp 543-558.

“The Limits to ‘New Regionalism’ (Re) Learning from the Media Industries” in *Geoforum* Volume 34 Issue 4, (November) 2003: pp 413-415

"Project Work in Context: Regulatory Change and the New Geography of Media" in *Environment and Planning A*, Volume 34 (11), 2002: pp 2003 – 2015.

“Why Do National Labor Market Practices Continue to Diverge in a Global Economy” in *Economic Geography* Volume 78, January 2002.

“Bennett Harrison’s Gift: Collaborative Approaches to Regional Development” in *Antipode* Volume 33 Number 1, January 2001.

CHAPTERS IN BOOKS

“Risks Beyond the Well Pad: The Economic Footprint of Shale Gas Development in the US” (forthcoming 2015) in Madelon Finkel (ed.) *The Human and Environmental Impact of Fracking: How Fracturing Shale for Gas Affects Us and Our World*. New York: Praeger Publishers.

- “Confronting an Uncertain Future: How US Communities are Responding to Shale Gas and Oil Development. 2014. In *Our Energy Future: Socioeconomic Implications and Policy Options for Rural America*, Oxford, UK: Taylor & Francis Group (with Ned Rightor)
- “Regional Innovation Networks and University-based Tech Transfer Models: The Potential for Hybrid Collaborative Models,” 2012, in Jaana Puuka (ed.) *Higher Education and Regional Economic Development Program*, IMHE. Paris: OECD.
- “Collaboration in Regional Innovation Networks and University-based Tech Transfer, Models” 2012 in Hans Christian Garmann Johnsen and Richard Ennals (eds.) *The Collaborative Advantage* London: Gower Press.
- “Labor Politics in a De-centered Global Media Industry” in Dwayne Winseck and Dal Yong Jin (eds.) 2011 *Media Political Economies: Hierarchies, Markets, and Finance in the Global Media Industries*. Bloomsbury Academic.
- “Connecting the Dots: Structure, Strategy and Subjectivity in Entertainment Media” 2010. in Mark Deuze (ed.) *Managing Media Work*. Thousand Oaks: Sage.
- “The Geographies of Capitalism,” 2010. in Roger Lee, Andrew Leyshon, Linda McDowell, and Peer Sunley (eds.) *A Compendium of Economic Geography* London: Sage Publications.
- “Behind the Scenes: How Transnational Firms are Constructing a New International Division of Labor in Media Work 2009. in Toby Miller (ed.) *The Contemporary Hollywood Reader*. London and New York: Routledge.
- “Green Dreams in a Cold Light” 2009 in Andy Pike, Andrés Rodríguez-Pose and John Tomaney (eds.). *Routledge Handbook of Local and Regional Development*, New York: Routledge.
- “The Next Move: Metro-Regions and the Transformation of the Freight Transport and Distribution System,” (with Michael Belzer) in Nancy Pindus, Howard Wial, and Harold Wolman (eds.) *Urban and Regional Policy and Its Effects*. Washington, D.C.: The Brookings Institution. 2009.
- “Working in the creative economy: Risk, adaptation, and the Persistence of Exclusionary Networks. 2009. In *Creative labour: working in the creative industries*, ed. Alan McKinlay and Chris Smith. 72-90. Basingstoke, UK: Palgrave MacMillan.
- “The Big Squeeze, Labor Politics in a Consolidated Media Industry” in Janet Wasko and Paul McDonald (eds.) *The Contemporary Hollywood Film Industry* Oxford: Blackwell, 2008.
- “Behind the Scenes” in Janet Wasko, Paul MacDonal and Mary Erickson (eds.) *Cross-Border Cultural Production: Economic Runaway or Globalization?* Amherst, MA: Cambria Press, 2008.
- "Divide and Conquer: Regional Competition in a Concentrated Media," in Greg Elmer and Michael Gasher (eds.) *Contracting Out Hollywood, Runaway Productions and Foreign Location Shooting* Boulder: Rowman & Littlefield, 2005.
- “Women and the Restructuring of Care Work - Cross-National Variations and Trends in Ten OECD Countries” in Ulrike Liebert and Nancy Hirschman (eds.) *Women and Welfare* Rutgers University Press, 2001.
- “Women’s Changing Status in a Global Economy” in R. Johnson, P. Taylor, M. Watts (eds.) *Geographies of Global Change*. Oxford: Blackwell, 2001.
- “Lean retailing in marketliberalen und koordinierten Wirtschaften (Lean Retailing in Liberal Market and Coordinated Economies) in H. Rudolph (ed.) *Aldi oder Arkaden? Unternehmen und Arbeit im europäischen Einzelhandel*. (Aldi or Arcade? Enterprise and Work in European Retailing) Berlin: edition sigma, 2001.

BOOK REVIEWS

Journal of Work and Occupations. Review of: Vicki Mayer, *Below the Line*. Duke University Press, 2011. (forthcoming Spring 2012).

Economic Geography Vol. 83, 2007. Review of: Allen Scott, *On Hollywood: The Place, The Industry*. Princeton University Press, 2005.

Economic Geography 2008 Volume 84, 2008. Review of: Andy Pike, Andrew Rodriguez Pose, John Tomaney, *Local and Regional Economic Development*. Routledge: 2006.

POLICY BRIEFS and REPORTS

A New Era of Crude Oil Transport: Risks and Impacts in the Great Lakes Basin. 2014 (November) Cornell Community and Regional Development Policy Report series. (with Kushan Dave) Available at: <http://cardi.cornell.edu/cals/devsoc/outreach/cardipublications/cardireports.cfm>

Are We Unprepared for "Pipelines on Rails"? Oil Pipeline Risks and Policy Challenges. Cornell Community and Regional Development Policy Brief Series No. 58 (February) 2014. Available at: <http://cardi.cornell.edu/cals/devsoc/outreach/cardipublications/research-and-policy-brief-series.cfm>

A Vote of No Confidence: Why Local Governments Take Action in Response to Shale Gas Development Cornell Community and Regional Development Policy Brief Series No. 54 (June) 2013. Available at: <http://cardi.cornell.edu/cals/devsoc/outreach/cardipublications/research-and-policy-brief-series.cfm> (with Ned Rightor and Clay Frickey).

Economic Implications of Marcellus Shale 2011. CaRDI Report, available at www.greenchoices.cornell.edu.

Building Regional Economies Through Targeted Workforce Development (with Warren Brown and Ned Rightor). Albany: New York State Association of Counties, 2009.

New York State's Approach to The Emerging Energy Environment and Its Implications for Economic Development. Boston: Massachusetts State Technology Center Project on State Policies in Alternative Energy, 2008.

An Industry Perspective on Surface Transportation and the Location of Transport Hubs and Facilities: The Trucking Industry (with Michael Belzer) Presented at Brookings Institution Conference on Industries and Regions, June, 2008, Washington, D.C.

Connecting Campus and Community to Foster A Creative Economy: Strategies and Lessons From Upstate New York. New York Campus Compact Occasional Papers. Available at: <http://www.nycc.cornell.edu/Documents/Publications/Occasional%20Papers/Occasional%20Papers%20summer2007.pdf>

Advanced Manufacturing in New York's Southern Tier: A Report to the New York State Association of Counties (with Warren Brown and Ned Rightor) Albany NY: New York State Association of Counties, 2007.

Taking Hold of the New Economy: A New Economy Model for Upstate New York and the Finger Lakes Region Ithaca NY: Cornell University Department of City and Regional Planning, Summer 2005.

Growing Apart: Income, Poverty, and Inequality in Upstate, 1980-2000 (with Rolf Pendall) Washington DC: The Brookings Institution, August 2004.

Transition and Renewal: The Emergence of a Diverse Upstate Economy (with Rolf Pendall and Matthew Drennan)
Washington DC: The Brookings Institution, January 2004.

Optics, Imaging, and Photonics, Building a 21st Century Industry in Rochester Department of City and Regional
Planning, Cornell University, March 2003

*Diversifying and Rebuilding Local Economies: A Progress Report on the Department of Housing and Urban
Development's Canal Corridor Initiative* U.S. Department of Housing and Urban Development, August 2000.

RECENT RESEARCH CONTRACTS AND GRANTS

Principal Investigator 2012-14
Risk Assessment of Crude Oil Transport in US Associated with Shale Oil Surge
New York State Department of Environmental Conservation
Albany, New York

Principal Investigator, 2011-15 (Two grants)
The Economic and Social Impacts of Shale Gas and Oil Development
The Heinz Endowments, Pittsburgh, Pennsylvania

Principal Investigator, 2010-11
A Comprehensive Economic Impact Analysis of the Marcellus Shale Natural Gas Drilling
Funded by: The Park Foundation, Ithaca, New York and the Heinz Endowments, Pittsburgh, Pennsylvania

Consultant Expert, 2009-11
Organization for Economic Cooperation and Development, Paris
Higher Education and Regional Economic Development
(I participated in regional studies, including in the Paso Del Norte region on the U.S. Mexico border, Sonora, Mexico; Catalonia in Spain, and Lombardy in Italy making presentations at project meetings in Paris (September 2010) and Seville (February 2011).

Principal Investigator, 2011-13
How Food Hubs Contribute to Economic Development in Rural Economies
United States Department of Agriculture

Co-Principal Investigator, 2009
Assessing the Impact of Renewable Energy on Rural Communities
Cornell Center for a Sustainable Future

Collaborating Researcher, 2009-11
The Impact Of Economic Integration On Workplace Governance in a Canada-United States Cross-Border Region
Canadian Social Sciences and Humanities Research Council

Publication Marketing and Promotion Grant, 2008-9
Alfred P. Sloan Foundation
To market and promote 2007 book, *Remaking Regional Economies*

Principal Investigator, 2008-9
Hatch-Stennis Grant Program, US Department of Agriculture
Evaluating the Economic Development Impact of Alternative Energy Development in Upstate New York

Principal Investigator, 2007-2009

Advanced Manufacturing and Its Impact on the New York Economy
New York State Association of Counties and New York State Department of Labor

Principal Investigator, 2003-06
The Creative Economy in Upstate New York
Hatch-Stennis Grant Program, U.S. Department of Agriculture

Principal Investigator, 2007
Retaining and Attracting a Skilled Workforce in Upstate New York
U.S. Economic Development Administration, New York State Technology Assistance Program, and the University Economic Development Center, Cornell University

Principal Investigator, 2004-06
High-Skilled Out-Sourcing – The Case of Media
The Rockefeller Foundation

Principal Investigator, 2002-06
The Restructuring of the Film and Television Industries in New York City
New York Production Alliance

Principal Investigator, 2001-03
Labor Market Processes in Rochester’s Optics, Imaging, and Photonics Industry
U.S. Department of Labor

Principal Investigator, 2001-03
Workforce Development in Rochester, New York
Annie E. Casey Foundation

Visiting Fellowship, April-May 2001
Wissenschaftszentrum (Sciences Center) Berlin, Germany

Consultant, 1999-2000
Planning for Privatization of the Audiovisual Media Sector in Jordan
United Nations Conference on Trade and Development

Principal Investigator, 1999-2000
Evaluation of the Erie Canal Corridor Initiative
U. S. Department of Housing and Urban Development

Consultant, 1999-2000
Coordination of Ten Country Study of Impact of Changes in the Public Sector on Women’s Occupations Paris:
Organization for Economic Cooperation and Development (OECD)

PROFESSIONAL AFFILIATIONS AND ACTIVITIES

Chair, Editorial Board, Regional Studies Book Series with Taylor and Francis on Cities and Regions.

Chair, Advisory Committee on Higher Education and Economic Development, The International Economic Development Council. 2012-13.

US National Research Council. 2013. I was a member of an appointed panel to examine governance and socio-economic risks associated with hydraulic fracturing.

One of my major professional responsibilities consists of publication review and editorial board work for key journals in my field and participation in establishing a new journal: *The Cambridge Journal on Regions, Economy and Society*. I have been an issue editor (responsible for soliciting articles and overseeing the editorial process and writing a synthesis piece to introduce the issue) for six issues of the journal.

Editorial Board Memberships

Current active memberships:

- *The Cambridge Journal on Regions, Economy and Society* (founding editor)
- *Geoforum*
- *The International Journal of Planning Studies*
- *Urban Studies*
- *Economic Geography*
- *Regional Studies*

CURRENT INTERNATIONAL PROFESSIONAL BOARD MEMBERSHIPS

Canada Research Chairs Program Review Panel,
Social Science and Humanities Research Council of Canada

International Advisory Board,
Centre for Urban and Regional Studies, Newcastle University

International Advisory Board,
Program on Globalization and Regional Innovation Systems, The Munk Center, University of Toronto

International Advisory Board,
The Institute of Communications Studies, Leeds University

MEDIA COVERAGE OF MY WORK

My research has resulted in interviews with and quotes in numerous newspapers including *The Los Angeles Times*, *The New York Times*, *The Boston Herald*, *The Philadelphia Inquirer* and *The Cleveland Plain Dealer* as well as on US National Public Radio and Television.