

ECONOMIC IMPACTS OF THE SING SING PRISON MUSEUM

Prepared for
Historic Hudson River Towns

By
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Introduction

The initial planning for the Sing Sing Prison Museum (the Museum) began in the 1990s and, after years of research, public outreach, and collaboration between Historic Hudson River Towns, the Town and Village of Ossining, the New York State Department of Correction and Community Supervision and the Friends of Sing Sing, has culminated in the 2016 Museum Program Plan prepared by Lord Cultural Resources.

The purpose of this report is to provide supporting economic impacts analysis documentation to be used as the current Museum program plan undergoes the SEQRA process. To this end, Urbanomics has calibrated the IMPLAN Pro Economic Impacts model to determine the direct, indirect and induced impacts of the Museum construction, operations and visitor spending on the Town of Ossining and Westchester County using the construction and operations cost estimates outlined by Lord Cultural Resources in the Sing Sing Prison Museum Program Plan and Supporting Documentation.

This study details the initial findings of the economic impacts modeling for the construction, employment and operations, and visitor spending of the proposed Sing Sing Prison Museum as presented in the September 2016 Lord Cultural Resources report. It also provides impacts estimates of the various alternatives including an off-site visitor center as well as increased ferry service between Haverstraw and Ossining.

IMPLAN data for 2015 was acquired for Westchester and Rockland Counties and the corresponding zip code divisions so that impacts may be modeled for both the Towns of Ossining, Haverstraw, and their respective counties as a whole. The construction impacts are modeled for both the current program with the onsite visitor center as well as for the alternative option of a visitor/intake center located within the CBD. Impacts of operations were modeled for the first five years of operations as described in the current Program. An alternative operations model was run using estimates of operations costs that would incur were the visitor center be offsite and require the running of a shuttle to the museum. Cost estimates for the alternative scenario will be drawn from comparable museums and historic sites. The impacts of increased ferry service/ridership were run for the individual municipalities and Counties.

Each section provides any additional assumptions, a summary of direct impacts, total impacts, and the county and municipal multipliers of labor and total economic activity, as well as assumptions of increased ferry ridership and corresponding increases in service between Haverstraw in Rockland County and Ossining due to the museum.

Key Findings

One Time Construction Benefits

(Range reflects a low of the Powerhouse alone to a high including the 1825 Cellblock, tunnel, and CBD visitor center.)

- Museum construction would have a one-time positive effect on the Hudson River Valley, generating between 320 and 431 direct and indirect person-years of employment, depending on construction program.
- Total construction outlays will range between \$66,496,881 and \$89,676,562, of which wages will total between \$24,523,187 and \$33,010,968.
- NYS personal income taxes on construction wages will total between \$1,594,007 and \$2,145,713 million.

Average Annual Benefits

(Low estimate is Museum and Visitor Expenditures alone; high estimate includes supplemental shuttle and ferry services.)

- Based on the operations program, the direct employment at the museum would generate \$1,693,822 in annual salaries and benefits.
- Employment for New York state-wide would increase by between 224 and 236 jobs, with projected earnings totaling between \$11,019,941 and \$13,550,888. Based on these totals, Westchester is anticipated to net between 135 and 147 of these jobs and \$6,744,966 and \$9,275,913 in earnings.
- Total direct on-site and off-site visitor spending in Westchester County is estimated at \$5,746,969 annually. The total direct visitor expenditures for New York state-wide is estimated at \$12,642,428.
- When indirect and induced spending is added to the direct spending, the total spending for New York state-wide jumps to between \$26,460,706 and \$31,321,124. Westchester is expected to take in between \$15,288,833 and \$20,149,251 of the state-wide total.
- The total personal income and sales taxes that could be generated for New York State by the proposed museum are estimated at between \$1,180,951 and \$1,330,277 annually.

In many respects, these estimates are conservative. The secondary effects were simulated in an inter-industry model calibrated on the Westchester County economy. Calibrating the model for a greater radius from the Museum would provide even greater impacts.

Economic Impacts

Overall Model Assumptions

The 2015 IMPLAN Pro Version 3.1 models were built and calibrated for:

- Westchester County;
- Westchester and Rockland County;
- Ossining Zip Code 10562;
- Haverstraw Zip Code 10927; and,
- Ossining Zip code 10562 and Haverstraw Zip Code 10927.

All assumptions of economic activity is based on the Lord Cultural Resources Museum Plan September, 2016.

All Activity was modeled for Westchester County and for Ossining Zip Code 10562 for Construction, Operation and Visitor Spending. The ferry service alternative was also modeled for Westchester and Rockland County, the Haverstraw Zip Code, and the Ossining and Haverstraw Zip Codes.

The IMPLAN local purchase percentage¹ was applied during all model calibrations.

Employment as characterized does not necessarily mean total jobs, but is person-years of labor.

All results are in current dollars.

¹ The local purchase percentage is the share of activity that may be attributed to the model calibration area. For example, some activity, such as the operation of large chain movie theaters, has little local impact as higher paying administrative jobs and concession items are sourced from a central warehouse located outside of the study area. Whereas, a bakery that hires from the neighborhood and purchases only locally sourced ingredients has a local purchase percentage of almost 100%.

Construction Impacts

Additional Construction Assumptions

Construction cost estimates are taken from the Cost+Plus report dated 6 September 2016. Construction was modeled to begin in 2019 with a duration of 1 year for a variety of construction options including the following components: the 1935 Powerhouse, the tunnel and 1825 Cell Block, and the Downtown Visitors Center. The impacts presented in Table 1 show the impacts of the current building plan, which includes the Powerhouse and 1825 Cell Block.

Table 1. Economic Impacts of Sing Sing Prison Museum Construction: 2019

	Westchester			Ossining Zip Code 10562		
Impact Type	Emp	Labor Income	Output	Emp	Labor Income	Output
Total Effect	410	\$31,426,839	\$85,357,872	320	\$24,884,471	\$69,007,580
Direct Effect	257	\$20,761,315	\$58,596,913	255	\$20,597,479	\$58,049,999
Indirect Effect	59	\$5,116,364	\$11,995,472	26	\$2,212,346	\$4,821,147
Induced Effect	94	\$5,549,160	\$14,765,486	39	\$2,074,646	\$6,136,434

Source: IMPLANPro, Lord Cultural Resources, Urbanomics

The full range of construction impacts by component can be found in the Appendix.

Direct Impacts

The direct impacts of Museum construction (\$58.6 million in outlays) will provide 257 jobs in Westchester County, with \$20.8 million in labor income. Of this, the vast majority of activity will accrue to Ossining Zip Code 10562, which will hold 255 of these jobs, \$20.6 million in labor income and \$58.0 million in business revenues.

Total Impacts (Direct, Indirect, Induced)

The direct construction activity will create a ripple effect of economic activity as materials and supporting services are purchased from other businesses, which in turn have to acquire additional goods to meet demand. In Westchester, the total economic impacts of construction activity will support some 410 jobs, \$31.4 million in labor income, and \$85.4 million in business revenues. Of this, Ossining Zip Code 10562 will see 320 jobs, \$24.9 million in labor income and \$69.0 million in business revenues.

Multipliers

Every Construction Job will create another 0.6 jobs in Westchester; of which 0.25 jobs are in Ossining. Every dollar of Construction Output will create another \$0.46 of economic activity in Westchester County; \$0.19 in Ossining.

Employment and Operations Impacts

Additional Operations Assumptions

Employment and Other Operations were modeled for the first 5 years of full operations (2020-2024) using the employment, wages and benefits information as estimated in the Lord Cultural Resources Museum Plan. The modeling did not include prison staff, because at the kick-off meeting on March 1, 2017, Sing Sing Correctional Facility Superintendent Michael Capra indicated that no additional prison personnel would be required due to the proximity of the museum to the existing correctional facility.

Table 2. Economic Impacts of Sing Sing Prison Museum Operations: Annual Average 2020-2024

Impact Type	Westchester County			Ossining Zip Code 10562		
	Employment	Labor Income	Output	Employment	Labor Income	Output
Total Effect	44	\$2,764,958	\$5,879,419	29	\$1,795,334	\$3,459,838
Direct Effect	27	\$1,693,822	\$2,801,678	22	\$1,356,948	\$2,238,350
Indirect Effect	9	\$580,252	\$1,774,319	5	\$288,907	\$780,004
Induced Effect	8	\$490,885	\$1,303,422	3	\$149,479	\$441,485

Source: IMPLANPro, Lord Cultural Resources, Urbanomics

Average Annual Direct Impacts of Employment and Operations

The average annual direct impacts of Museum Employment and Operations in Westchester County, total 27 jobs with \$1.7 million in labor income, as well as \$2.8 million in outlays. Ossining will benefit from 22 jobs with \$1.3 million in labor income, and \$2.2 million in business activity.

Average Annual Total Impacts (Direct, Indirect, Induced) of Employment and Operations

When looking at direct, indirect and induced impacts, Westchester County will benefit from 44 jobs with \$2.8 million in labor income, and \$5.9 million in total economic activity annually. Ossining will have 29 jobs with \$1.8 million in labor income, as well as \$3.5 million in total economic activity.

Multipliers

Every job at the Museum will support another 0.63 jobs in Westchester County; 0.33 of which are in Ossining. Every dollar of operations outlays will create another \$1.08 of economic activity in Westchester County; of which \$0.54 is in Ossining.

Visitor Spending Impacts

Additional Visitor Spending Assumptions

Visitor expenditures were updated to 2016 dollars from the 2007 Assessment of Economic Impacts and Planning Framework, in order to maintain continuity among the impacts studies over time.²

Visitor expenditures are characterized as local (those who would be spending money in the area anyway) and non-local (those whose expenditures are an impact drawn by the museum). The Lord Report classified visitors by three designations: “Regional”, “School”, and “Tourist”. Visitor expenditures economic impacts were modeled only for Regional visitors (“local”) at \$141.40 per person and Tourists (“non-local”) at \$152.47 per person.

Visitor expenditures as described above were modeled for the first 5 years of full operations (2020-2024), proportionally distributed as per the 2007 report, yielding per capita expenditures by category as follows in Table 3.

Table 3. Local and Non-Local Visitor per Capita Expenditures

	Local	Non-Local
Accommodations:	\$0.00	\$56.89
Food & Beverage:	\$32.18	\$25.70
Retail:	\$46.29	\$21.29
Transportation:	\$31.48	\$25.89
Entertainment/Recreation:	\$24.37	\$15.77
Other:	\$7.10	\$6.93

Source: Urbanomics based on 2007 *Assessment of Economic Impacts and Planning Framework*, which in turn based the assumptions on the 2001 *Market Potential for Sing Sing Historic Prison*, Table IX-3.

Table 4 shows the impacts of the expenditures of local and non-local Museum visitors on Westchester’s economy.

Table 4. Economic Impacts of Sing Sing Prison Museum Visitor Expenditures: Annual Average 2020-2024

Impact Type	Westchester			New York State		
	Emp	Labor Income	Output	Emp	Labor Income	Output
Total Effect	91	\$3,980,008	\$9,409,414	180	\$8,254,982	\$20,581,287
Direct Effect	70	\$2,613,215	\$5,746,969	135	\$5,281,731	\$12,642,428
Indirect Effect	9	\$663,033	\$1,793,097	21	\$1,511,763	\$4,057,743
Induced Effect	12	\$703,759	\$1,869,347	24	\$1,461,487	\$3,881,115

Source: IMPLANPro, Lord Cultural Resources, 2007 Assessment of Economic Impacts and Planning Framework, Urbanomics

² Distribution of expenditures was drawn from the 2007 *Assessment of Economic Impacts and Planning Framework*, which in turn based the assumptions on the 2001 *Market Potential for Sing Sing Historic Prison*, Table IX-3.

Average Annual Direct Impacts of Sing Sing Prison Museum Visitor Expenditures

Limiting the model to the local purchase percentage, direct visitor expenditures in Westchester County will total \$5.7 million, supporting 70 jobs with \$2.6 million in wages. Expanding the model to include all of New York State, direct visitor expenditures will directly account for an annual average of \$12.6 million in total sales³, supporting 135 jobs, and \$5.3 million in labor income in New York State.

Expenditures derived from local and non-local visitors may be found in the Appendix.

Average Annual Total Impacts (Direct, Indirect, Induced) of Sing Sing Prison Museum Visitor Expenditures

When looking at the total impacts of all local and non-local Museum visitor expenditures, spending activity will support an additional 45 jobs with \$3.0 million in additional wages, and another \$7.5 million in outlays, for a total impact of 180 jobs, \$8.3 million in wages and \$20.6 million in economic activity. Of this, the local share is 91 total jobs with \$4 million in wages and \$9.4 million of total economic activity.

However, it should be noted that the model instrument does not take transit and topography into account. The Museum is within a short walk of the MetroNorth Ossining train station, making it easy for train visitors to go to the Museum and get back on the train, without visiting the downtown. Further exacerbating the situation, the steep incline between the Museum and the downtown discourages those on foot from venturing up to the Village's commercial district. In order for the Village of Ossining to capture the full share of economic activity, there needs to be a means, such as a shuttle, to facilitate circulation from the Museum and train station to the CBD.

Multipliers

Every job supported by direct visitor expenditures will support another 0.33 jobs. Every dollar of visitor expenditure outlays will create another \$0.63 of economic activity.

Fiscal Impacts

Income Tax

2016 NYS Income Tax Rates for the average wage were applied to Construction Labor and the Cumulative Labor Income Impacts of Operations and Visitor Expenditures. The application of tax rates conservatively assumes a single income household; it is likely that most workers live in multiple income households and would therefore be taxed at a higher rate.

As discussed previously, direct construction wages total \$20.8 million dollars, with an additional \$10.6 million in wages for indirect and induced employment. Average per capita construction wages have a current New York State tax rate of 6.45%. The application of this rate will yield \$2.04 million in New York State income taxes.

³ The full cost of retail items purchased by visitors is not included in the direct impact, but only the margin added by the Museum or local retailers, since most purchased goods are not manufactured in the local area.

Over the course of the first five years of Museum operations, baseline employment will yield an annual average of \$1.7 million in labor income may be attributed to the direct, indirect and induced impacts of the Museums operations. Wages in these (primarily service sector) categories are lower than those in construction and therefore taxes were estimated at the lower rate of 5.9 percent; however, they still provide the state with an additional \$1.45 million in income taxes over the course of five years.

Retail Sales Tax

The NYS Retail Sales Tax rate of 4% was applied to the Restaurants and Miscellaneous Retail portions of non-local visitor expenditures. (Tax exemptions on specific items such as clothing under \$100 limit the sales taxes that may be drawn.)

Table 5. Summary of Fiscal Impacts of Baseline Construction and Operations of Sing Sing Prison Museum

	Economic Contribution		NYS Taxes	
	Direct	Total	Direct	Total
One Time Construction Labor Income	\$20,761,315	\$31,426,839	\$1,349,485	\$2,042,745
<i>Average Annual Income and Retail Sales</i>	<i>\$</i>	<i>\$</i>	<i>\$</i>	<i>\$</i>
Average Annual Operations Labor Income	\$15,537,490	\$24,547,219	\$916,712	\$1,448,286
Museum Labor Income	\$1,693,822	\$2,764,958	\$99,935	\$163,133
Average Annual Retail Sales	\$5,622,215	\$5,622,215	\$224,889	\$224,889

Source: IMPLANPro, Lord Cultural Resources, NPS, Urbanomics

Tax Revenue Summary

New York State will receive more than \$3.7 million in tax revenues over six years due to the construction and the first five years of operations of the Sing Sing Prison Museum.

Income Taxes: \$3.48 million

\$2.03 million from 1 year of construction

\$1.48 million from 5 years operations

Non-local Visitor Restaurant and Misc. Retail Sales: \$224,889

Alternatives

Powerhouse Alone

As of the writing of this report, permission to access the 1825 Cell Block has not been granted. The Museum may move ahead using only the Powerhouse site; while it is assumed that operations costs will remain much the same, the construction costs will be reduced. Using the Cost+Plus estimates for site clearing and construction in the Powerhouse alone, direct construction costs will be \$45.6 million compared to \$58.6 million for the full development program.

As shown in the table below, these direct outlays will support some 200 jobs with \$16.2 million in labor income. During the year of construction, the ripple effects of this activity will support an additional 120 jobs with \$8.3 million in wages and benefits.

Table 5. Economic Impacts of Site Clearance and Powerhouse Construction Alone

Impact Type	Employment	Labor Income	Output
Total Effect	320	\$24,523,187	\$66,496,881
Direct Effect	200	\$16,190,239	\$45,611,436
Indirect Effect	46	\$4,002,720	\$9,363,358
Induced Effect	73	\$4,330,229	\$11,522,087

Source: IMPLANPro, Lord Cultural Resources, Cost+Plus, Urbanomics

The full economic impacts will total \$66.5 million in business revenues, 320 jobs and \$24.5 million in wages, a reduction of some \$20 million and 90 jobs compared to the full construction plan.

The loss of these wages will affect the State income taxes to be drawn from the construction and supporting labor. Total income taxes for the reduced program are \$1.6 million, a \$400,000 reduction.

Visitor Center in Downtown

The development of a visitor center in downtown Ossining would increase the construction expenditures for the offsite facility. It is assumed that expenditures for the Museum itself will remain constant. Using the construction cost estimates by square foot as established in the Cost+Plus documents, it is assumed that a 5000 sf visitor center in the CBD would have an overall construction cost of \$594 per square foot, or \$2.97 million.⁴

Table 6. Economic Impacts of Visitor Center Construction

Impact Type	Employment	Labor Income	Output
Total Effect	21	\$1,584,129	\$4,318,690
Direct Effect	13	\$1,048,890	\$2,970,000
Indirect Effect	3	\$255,539	\$603,961
Induced Effect	5	\$279,699	\$744,729

Source: IMPLANPro, Lord Cultural Resources, Cost+Plus, Urbanomics

As shown in the Table above, the \$2.97 million construction of the visitor center in the central business district will directly provide 13 construction jobs with \$1.05 million in wages. The ripple effects of this construction activity will support another 8 jobs in the area, with total wages of \$535,000. Combined, these jobs will yield \$102,176 in income taxes to New York State.

Visitor Shuttle Service

Having a Downtown Visitor Center will require the implementation of a shuttle service from the MetroNorth Railroad station to the Visitor Center to the Museum. For optimal efficiency, the shuttle should do the loop every half hour from 9:30 am (meeting the train before the Museum opens to allow for transfer to and check in at the Visitors Center) to 6:30 pm, allowing visitors to get something to eat or shop in the CBD. The Dutchess County Department of Tourism runs fresh farm tours with shuttle rental averaging roughly \$135 an hour.

⁴ It is assumed that there will be no change in cost to the Museum itself because the sections of the floor that were to stage any intake activity that will take place off-site will be replaced with additional exhibit space.

Assuming that same rate, the costs for a single shuttle for 9 hours would be \$1,215 a day. Assuming the museum is operational six days a week, 52 weeks per year, the annual shuttle operational cost would be \$379,080.

Table 7. Economic Impacts of Visitor Shuttle Operations (First 5 Years of Operations)

Impact Type	Annual Average			5 Year Total		
	Jobs	Labor Income	Output	Emp	Labor Income	Output
Total Effect	5	\$264,044	\$586,567	26	\$1,320,218	\$2,932,833
Direct Effect	4	\$174,729	\$362,966	20	\$873,644	\$1,814,832
Indirect Effect	1	\$42,575	\$99,243	3	\$212,876	\$496,214
Induced Effect	1	\$46,740	\$124,357	4	\$233,698	\$621,787

Source: IMPLANPro, Dutchess County Department of Tourism, Urbanomics

The table above shows the impacts of the shuttle service modeled for Westchester County for the first five years of operations. The shuttle would directly employ four people with an average annual wage of \$43,682, totaling some \$174,729 in direct wages each year. Cumulatively, the first five years of operations will support 20 direct person-years of employment, with gross wages of \$873,644. The ripple effects of this activity will support additional jobs with aggregate wages over five years of \$1.3 million, yielding some \$77,893 in New York State income taxes as an average tax rate of 5.9 percent.⁵

In addition, having a CBD location for the drop off and pick up areas for Museum attendees will increase opportunities for local spending for non-local visitors, which will increase both the economic impacts and the sales tax benefits that will accrue to the State of New York.

Additional Ferry Service

NY Waterway ferry service between Haverstraw and Ossining runs on Weekday mornings from 5:50 a.m. to 9:00 am, with six departures from in each direction. Seventeen additional trips are scheduled for weekday evenings from 4:42 to 9:32 p.m., with nine running from Ossining to Haverstraw and eight running from Haverstraw to Ossining. According to 2016 information pulled from the Village of Nyack Comprehensive Plan, Metro-North contracts with NYWaterways to provide weekday service between Haverstraw and Ossining for 1.7 million per year. Extending operations to include weekends at the same limited level of service (although not the same hours of operation), is estimated to cost an additional \$680,000.

There is relatively little water transportation activity in Westchester and Rockland Counties as wholes, therefore the economic impacts of the ferry activity was modeled using the zip codes for Ossining and Haverstraw, 10562 and 10927, respectively. The results of this modeling are shown in the table that follows.

⁵ The cost of the shuttle was modeled as a full-time service, however it is likely that, at least initially, the shuttle will run only on peak days, two or three days each week.

Table 8. Economic Impacts of Expanded Ferry Operations (First 5 Years of Operations)

Impact Type	Annual Average			5 Year Total		
	Emp	Labor Income	Output	Emp	Labor Income	Output
Total Effect	1.5	\$453,381	\$854,770	7.4	\$2,266,903	\$4,273,851
Direct Effect	0.4	\$380,914	\$666,538	1.8	\$1,904,569	\$3,332,688
Indirect Effect	0.3	\$33,628	\$69,818	1.7	\$168,138	\$349,091
Induced Effect	0.8	\$38,839	\$118,414	3.8	\$194,196	\$592,072

Source: IMPLANPro, Urbanomics, Lord Cultural Resources, Cost+Plus, Dutchess County Department of Tourism, Village of Nyack Comprehensive Plan, NPS

Over the course of the first five years of operations, the direct outlays to expand ferry service to the weekends along with the impacts of these operations, including the expenditures of vendors and household purchases of employees will generate \$4.27 million in business revenues over the course of five years in Ossining and Haverstraw, for an average of \$854,770 a year. In terms of jobs, expanding the ferry service will have little impact creating 1.5 jobs per year, or roughly 7.4 person-years of employment over the course of five years. Wages paid over the course of that period will total \$2.27 million—yielding some \$133,747 in New York State income tax revenues, or \$26,749 each year.

Along with the direct operations outlays, increased ferry service will allow for greater numbers of visitors using “other” travel methods. However, the number of Museum visitors arriving by Haverstraw-Ossining ferry service would be almost entirely local residents who would be spending their recreational dollars in the area anyway, making the economic boost from this increased visitor spending negligible.

Conclusions

The Sing Sing Prison Museum will be an economic and fiscal benefit to Ossining, Westchester County and New York State.

As shown in Table 9, over the construction period and first five years of operations the direct economic benefits of the Museum as planned include 431 person years of labor, \$36.3 million in wages and benefits and \$88.9 million in economic activity. When modeled to include indirect and induced benefits (i.e., the ripple effects on the economy), the result of the Museum’s construction and operations yields 681 person years of labor, \$55.97 million in labor income and \$141.07 million in business revenues.

This economic activity is conservatively estimated to yield a total of \$3.5 million in New York State income taxes and an additional \$224,000 in retail sales taxes over the construction period and first five years of operations.

Table 9. Aggregate Economic Benefits of Construction and First Five Years of Operations

Impact Type	Direct			Total		
	Person-Years of Labor	Labor Income	Output	Person-Years of Labor	Labor Income	Output
Total	431	\$36,298,805	\$88,912,731	681	\$55,974,058	\$141,074,354
Planned Construction	257	\$20,761,315	\$58,596,913	410	\$31,426,839	\$85,357,872
Operations/ Employment	135	\$8,469,109	\$14,008,389	221	\$13,824,792	\$29,397,094
Visitor Spending	39	\$7,068,381	\$16,307,429	50	\$10,722,427	\$26,319,388
Alternatives Potential	35	\$3,827,103	\$8,117,520	55	\$5,171,250	\$11,525,374
<i>CBD Visitor Center Construction</i>	13	\$1,048,890	\$2,970,000	21	\$1,584,129	\$4,318,690
<i>Shuttle Service</i>	20	\$873,644	\$1,814,832	26	\$1,320,218	\$2,932,833
<i>Ferry Service</i>	2	\$1,904,569	\$3,332,688	7	\$2,266,903	\$4,273,851

Source: IMPLANPro, Village of Nyack Comprehensive Plan, Urbanomics

The addition of the three alternative services, the CBD visitor center, the shuttle service and increased ferry service could potentially add another 55 person years of labor, \$5.2 million in wages and \$11.5 million in economic activity, as well as another \$314,000 in New York State income taxes.