Focus on the Future of Main Street
An Economic Development Planning Strategy
Oneonta, NY

Prepared by:

The LA GROUP
Landscape Architecture & Engineering P.C.
People. Purpose. Place.

In Association with:

ConsultEcon, Inc. FoitAlbert Associates TRAMPOLINE Advertising & Design Co Shelter Planning & Development Inc.

May 2016

Focus on the Future of Main Street

An Economic Development Planning Study

Presented to:

The City of Oneonta
City Hall
258 Main Street
Oneonta, New York 13820

<u>Mayor:</u>
Gary Herzig

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May 2016

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I. PREAMBLE

Stemming from a keen awareness of the importance of its downtown, its residents and the local economy, the City of Oneonta, NY embarked upon a proactive effort to study the downtown area and develop a forward thinking strategy to position the downtown as a viable location to shop, access services and entertainment, own and manage a business, attend an event, and reside. The City secured funding assistance and undertook a solicitation process to select a qualified consultant team to assist with development of the study. As a result of the solicitation process, The LA Group consultant team was selected and work began in September 2015. Given the broad scope of tasks involved for a responsive strategy The LA Group Team divided the responsibilities relating to the study in the following manner:

- The LA Group would be responsible for overall project management and principle oversight of the public engagement process associated with the study's development and the housing analysis and infrastructure review.
- ConsultEcon, Inc. would be primarily responsible for the market and economic analysis.
- Trampoline Advertising and Design Co. would be primarily responsible for review of the marketing element of the study.
- Foit-Albert Associates – Architecture, Engineering, Surveying would primarily be responsible for the analysis of parking.
- Shelter Planning and Development, Inc. would assist with the housing analysis.

Public engagement and study development progressed through the fall and winter and strategy development and work product finalization proceeded through the spring of 2016 resulting in presentation of the final study and associated strategy to the City of Oneonta Common Council in May of 2016.

The LA Group Team would like to extend appreciation to the officials and staff at the City of Oneonta, the staff and volunteers of Destination Oneonta, and the Greater Oneonta Historical Society for their assistance through the study development process. In particular, our thanks are extended to the City's Director of Finance and the Acting City Manager – Meg Hungerford; the City's Director of Community Development – Bill Kerbin; the City's Housing Specialist – Jeff House; the City's Engineer – Greg Mattice; and Code Enforcement Officer – Robert Chiappisi, who were instrumental in providing information and supporting the study's overall development.

II. PURPOSE, INTRODUCTION AND HISTORICAL SIGNIFICANCE

A. Purpose of the Study

The City of Oneonta has sponsored the preparation of this plan in recognition of the importance of the downtown area to the local economy, the residents of the community, and the overall culture of the region. The downtown area by virtue of its history, overall pattern of development, the architecture of the building stock, and the uses and density of uses there, has and continues to be a leading contributor to the identity of the City. In recognition of these characteristics, City officials are proactively interested in planning for the future of downtown and the measures necessary to maintain and expand the relevance of downtown to the community and the wider region. This plan has been prepared to fulfill this purpose by setting forth a series of steps that when implemented will expand on the positive qualities of downtown while addressing the needs identified by residents and businesses.

The plan consists of a series of strategic steps that are intended to maintain the recognition of downtown as a location for goods and services, and also expand upon its economic potential as regional center for entertainment, arts and cultural attractions, community events, dining, and year-round living. The strategy was developed from implementation of an inclusive community engagement program that sought input from residents, business owners, and property owners. The program also included the development and distribution of a survey as a means to gauge the perceived value of downtown as a resource for goods and services to the consumers that frequent downtown businesses and service providers. Lastly, interviews with City officials, business association members, chamber of commerce staff, and business persons around downtown were performed to complete the public engagement process.

B. Introduction

The approach utilized in the development of the plan undertook a holistic view of the downtown area so that a realistic strategy to direct future actions and initiatives can result. Therefore, the development process took into consideration the following elements:

- The history of the downtown area and the its heritage within the wider region
- The physical boundary of the study area
- The nature of the land use pattern – types and density of land use
- The local regulatory program for management of land uses and development within the delineated study area boundary
- The public infrastructure serving the downtown area – such as roads, water sewer, and parking
- The general condition of the building stock – physical outward appearance as well as available capacity to accommodate future land use needs
- Housing within the study area boundary: What are the current conditions? What opportunities are available to address future needs while potentially complementing current land uses in the downtown area?
- The market for goods and services: What goods and services are in demand? Where are the shortfalls? Where are opportunities for growth?
- The marketing program for the downtown area: How could the program improve to extend the reach and penetration of the businesses in the downtown area?

Assessing these elements as standalone considerations is insufficient if such assessment is done without regard to input from the people who interact with the downtown area on a daily basis. Therefore, a public outreach process was undertaken as a means to access the public perception of downtown, the goods and services found there, and to what degree these goods and services are responsively meeting demands.
The outreach program also was seeking to gain input regarding opportunities for improvement.

Once the assessment of the above elements was completed, and the public comments were received a comprehensive strategy was developed. The emerging trends and concluding recommendations form a comprehensive strategy that is intended to position downtown Oneonta as a dynamic center for year-round living, and accessing goods, services and entertainment.

C. The Historical Significance of Oneonta's Downtown

Due to its geographic location and history as one of the early settlements in the region, the City of Oneonta has long been recognized as a hub for commerce. Its name is derived from a Mohawk Indian word, pronounced *o-neny-onda*, Oneonta can literally be translated as "rocks sticking out," a reference to the exposed bedrock cliff faces found on the east end and north side of the city.[1] The first hamlet was developed around 1800 and was later known as "Milfordville." In 1830, the Town of Oneonta was formed from parts of two other Towns in the county. Milfordville changed its name to Oneonta in 1832. In 1848, it was incorporated as a village within the Town. In the mid-19th century, the Delaware and Hudson Railroad reached Oneonta, stimulating development as a railroad center and attracting new industries. The village formally incorporated as a city in 1909.

The history of the downtown Oneonta is rich with events as the region's core location for: employment, commerce, transportation, accessing medical and governmental services, and with the location of two colleges within the City's border – higher education.

The following timeline highlights the significance downtown has played in its role as a center for the City and the region:

[1] http://www.oneontahistorian.com Oneonta Facts, Mark Simonson; 2003-2015

Table 1
A Historical Timeline of Events for Downtown Oneonta

1848	**Oneonta was formally incorporated as the Village of Oneonta**
1894	**A meeting was held at the Metropolitan Theater on Dietz Street in downtown Oneonta to discuss the fate of the Oneonta Normal School** • The Oneonta Normal School which was established in 1889 later renamed the State University College at Oneonta (SUCO) • A fire destroyed the school five years later • The meeting was convened to discuss plans as to how the school could continue and how the school building could be rebuilt
1898	**Company G returning from the Spanish-American War arrives at the downtown Oneonta train depot located on what today is known as Market Street** • 86 men are reunited with their families on Christmas Day • Thousands awaited arrival of the train to see the men who had been gone since May
1900	**Health Care Services Improve and a YMCA is established** • On October 5^{th} the cornerstone for the A.O. Memorial Hospital is set and patient admission began in June of 1901 • The new YMCA is dedicated on March 27^{th}
1906	**The Wilber building at the corner of South Main and Main Street, the Village Hall and fire department in downtown Oneonta were lost to fire** • Two large blocks were lost to the fire • Included in the fire were the Village Hall located on what is now 242 Main Street, the fire department and several adjoining storefronts
1908	**Fire on the south side of Main Street** • Several wooden buildings are lost to fire across Main Street from Bresee's Department Store **Neahwa Park is formed** • The Village Trustees accept a donation of 75 acres of land adjoining the Susquehanna River, from Dr. and Mrs. Lewis Rutherford Morris – first called Morris Park the Common Council changed the name to Neahwa Park in 1911
1909	**Oneonta officially became a City** • Gov. Evans signed a bill in May of the previous year creating the "City" of Oneonta; the designation becomes official on January 1, 1909 and is marked by the dedication of a new city hall • At the time, the City of Oneonta was the 46^{th} city in New York State
1910	**The Central Hotel Building at Dietz Street and Main Street in downtown Oneonta was lost to fire** • The block was a total loss • The hotel was replaced the next year by the Oneonta Hotel on what is now 189 Main Street block  *Figure 1-The Central Hotel Building*
1911	**The D&H came to Oneonta** • The division headquarters of the D&H Railway were moved to Oneonta and employed nearly 40% of the City's population at the time • The D&H profoundly impacted the economy of the City and the downtown for decades **A major department store opened in downtown** • FW Woolworth opened at what it is 203 Main Street

1915	**A new post office opened in downtown** • June 14th – a new post office opened at what is now City Hall at 258 Main Street
1917	**President Wilson signed a declaration of war with Germany on April 6th** • A crowd estimated at 2,000 gathers in downtown at the Armory on Academy St. as they listened to rousing speeches in support
1918	**November 11th – World War I ended** • Church bells and whistles from the rail yard were heard across downtown • A spontaneous bonfire was started in downtown at the corner of Broad and Main Street where Muller Plaza is today • An impromptu parade also formed and an improvised band provided music
1922	**Preparations were made for a theater in downtown** • The DF Wilber house at the corner of Main Street and Ford Avenue was demolished in preparation of what will be known as the Maxey Theater which opened On December 2nd and was later called the Palace until 1966 when it was torn down for the expansion of the Wilber National Bank (Community Bank) **May 31st – The first "stop and go" traffic signals in downtown were installed at the corner of Broad Street and Main Street**
1928	**Another department store came to downtown** • The JC Penney Co. took possession of the new store at the corner of Main Street and Ford Avenue
1933	**As a result of the establishment of the National Recovery Administration the "Now is the Time to Buy" campaign was initiated in downtown Oneonta and** • A parade attracting an estimated 8,000 marchers plus thousands of spectators lined the street promoting expenditures in downtown stores **The Civilian Conservation Corps (CCC) was formed** • Men working in the CCC spent a portion of their $30 per month wage in downtown dance halls and movie theaters • Under the sponsorship of the Oneonta Chamber of Commerce community soup kitchen opens in the municipal building at 242 Main Street • The municipal building site also provided wooden bunks in the back for overnight stay
1937	**The Common Council adopted the City's first zoning ordinance**
1940	**Members of Company G of the New York National Guard head off for training** • In October thousands of people line the streets in downtown from the State Armory on Fairview Street, along Main Street to the D&H Railroad Station on Broad Street to bid farewell to 108 local men as they went off for training at Fort McClellan in Alabama
1941	**World War II begins** • On December 8th the recruiting US Army and Navy recruiting offices in downtown at the Post Office at 258 Main Street, today's City Hall as 75 men seek information about enlistment
1942	**May 1st – Residents gathered downtown at a rally for buying war bonds**
1943	**The Challenges of War Are Met across the City** • The Oneonta Victory Garden Committee was busily securing sites (yards, vacant lots, ball fields, small strips between row houses) for community gardens to grow food for the troops • Eight gardens are created across the City • Over 4,000 tons of scrap metal is generated from downtown across the City • The Honor Roll is placed in front of the Post Office on Main Street – the Honor Roll stood until 1950 when it was heavily damaged by a wind storm and had to be removed
1945	**August 14th – World War II ends** • Preparations are made in downtown for a celebratory event at the Honor Roll • An estimated crowd of 10,000 people lined Main Street as a parade is held in downtown from the Armory on Fairview Street, along Main Street to the Honor Roll site
1951	**Transportation evolves and vehicular use rises** • Automobile use increased to the point that traffic congestion, particularly in downtown Oneonta was a growing concern • An arterial bypass of the downtown is suggested – with two alternatives devised: One basically diverted traffic through a route north of Main Street and second and preferred alternative was known as "alternative Route 7" ran along the south side of the Susquehanna River • Neither alternative was acted upon and the congestion was managed until a new interstate highway – today known as I-88, was proposed in 1968

1952	**The decline of the D&H railroad begins** • On September 3rd the first diesel-powered locomotive stopped in Oneonta – one week later 105 men at the roundhouse (at over 400 ft. in diameter – the largest in the world) are furloughed leaving 173 workers on site • The last steam engine appeared a year later and the razing of the roundhouse was completed in 1993 **Downtown retailers begin to take on a more modern look** • 56 twin headed parking meters were installed in the Dietz Street parking lot • To combat suburban sprawl modernization projects begin to occur in downtown Oneonta – a huge crowd gathered and the Oneonta High School Band marched down Chestnut Street on November 17th to mark the opening of a new escalator at Bresee's Department Store  *Figure 2 - The Opening of the Escalator at Bresee's Department Store* • The event marked the first installation of an escalator in a City with a population under 13,000 people – so significant was the escalator that Bresee's built an entire marketing campaign for the holiday season around the escalator's construction the tag line was "Notice Our Otis?"
1953	**A car giveaway contest in downtown attracts thousands** • September 17th – Bresee's Department Store organized a Thursday night raffle to giveaway a Dodge automobile from McNeeley-Sweet Motors • Over 5,000 people crowded Main Street to see the drawing  *Figure 3 - Thousands Gather on Main Street to Hear the Results of an Automobile Raffle*
1957	**Improvements to downtown lighting are ceremoniously ushered in** • July 11th – a gathering of approximately 5,000 people celebrated the installation of new lights in the downtown area as the lights "represent the progress we're all trying to achieve"[2] • A switch from a platform in front of City Hall is ceremoniously thrown which illuminated the 30 foot lamps along Main Street – the lighting ceremony was followed by a block dance on Elm Street • The lights from this event were in place until 1980 when the appearance was changed with the installation of ornamental street lighting that has carried through to today

[2] Wilber National Bank advertisement from the Daily Star newspaper

1959	**The effort to modernize downtown continues** • After some opposition a parking lot was approved at the corner of Main Street and Market Street and is known as Clinton Plaza today • Bresee's Department Store constructed a "modern" aluminum facade over the original brick exterior – the aluminum was removed in November 2009 as part of the renovation of a series of buildings now known as Parkview Place
1962	**An ordinance is passed which allows construction of a motel** • The motel was to be located at the corner of Main Street and Grand Street and it became known as the Town House **Retail businesses become established outside of downtown** • A Jamesway Discount Store is constructed in Oneonta's East End and features a dedicated parking lot with free parking • Within the next year the West End Plaza opens up at the corner of Chestnut Street and Oneida Street **Education becomes a "growth" segment for Oneonta** • October 20th – it is reported that New York State will invest $25 million ($196.3 million in today's dollars[3]) in the construction of approximately 20 buildings at the State University College at Oneonta which will more than double the capacity of the college
1963	**Railway passenger service into downtown Oneonta ended** • January 24th – Passenger service by the D&H Railway was terminated **The YMCA was relocated** • A plan was submitted to move the YMCA from Broad Street to Ford Avenue
1964	**Master Plan consultant, J.C. Burdis proposed demolition of the Wilber Mansion at 11 Ford Avenue to facilitate a circular traffic pattern around downtown and to create space for more parking – adverse public sentiment resulted in the concept being dropped**
1965	**Urban renewal is proposed for downtown Oneonta** • May 12th the City's urban renewal program is formally launched • Patrick Kane from the Urban Renewal Planning Firm is quoted as saying "The program is not going to be a bed of roses" as the plans associated with the program to "modernize" downtown called for demolition of many buildings in the downtown area • The basic thrust of the program was to establish downtown as a "retail magnet" as the education of young adults was becoming a major force in the local economy[4] • The intent was to have downtown become competitive with the new retail establishments being built in the Town of Oneonta **The new $700,000 YMCA on Ford Avenue was dedicated on June 27th**
1966	**After 15 years professional baseball returned to Oneonta** • The Boston Red Sox moved their single A affiliate to Oneonta from Wellsville **Urban Renewal** • The preliminary Urban Renewal proposal was submitted to the US Department of Housing and Urban Development (HUD) for approval
1967	**The first sales tax was imposed** • Despite rigorous objections from downtown merchants Otsego County approved a 2% county sales tax that was to become effective on February 1st of the following year **Urban Renewal advanced through the next step** • October 24th – The Capital Budget and Planning Commission approved the City's Urban Renewal Plan • The Oneonta Housing Authority was named
1968	**The City's Urban Renewal Plan is funded** • HUD approved $4.1 million ($27.9 million in today's dollars[5]) for the redevelopment plan
1970	**The fiscal impact of SUCO's influence is quantified** • SUCO's Economics Department prepared an in-depth study of the impact of the state college on Otsego County • The study estimated that there would be $158 less per capita in the county annually if the

[3] US Department of Labor – Bureau of Labor Statistics: CPI Inflation Calculator; http://www.bls.gov/data/inflation_calculator.htm
[4] "Local renewal was the spirit of the '60s" – The Daily Star, August 7, 2015
[5] US Department of Labor – Bureau of Labor Statistics: CPI Inflation Calculator; http://www.bls.gov/data/inflation_calculator.htm

	State University College were not located in Oneonta – factoring for inflation this amount equates to $965 less per capita in today's dollars[6]
1971	**Work on the interstate bypass (I-88) of the downtown area began**
1972	**Anti-war demonstrators gathered in downtown at the military recruitment office on Dietz Street to conduct a sit-in**
1973	**Urban Renewal in downtown Oneonta began** • March 19th – A groundbreaking ceremony was held in the area of Main Street, Grove Street and Chestnut Street as demolition of the "Stanton Block" or Block One of the City's program begins – today the site address is 125 Main Street • The Stanton Opera house had stood on this block since the 1870's  *Figure 4 - Demolition of the Stanton Block Commences*
1974	**Urban Renewal enters the next phase of implementation** • Demolition of Block Two begins – today the area is known as Clinton Plaza • Construction of the parking garage at the corner of Market Street and Chestnut Street begins • Both projects are completed by 1975 **A court injunction holding up completion of I-88 was lifted** • The sections of the interstate were opened to traffic
1975	**The new parking garage in downtown is opened in time for holiday shoppers**
1976	**The last phase of Urban Renewal in downtown is completed** • Mass demolition of the Broad Street, South Main Street, Market Street and Prospect Street area is completed • The expansive empty lot is targeted for a construction of a downtown retail shopping mall and the formal recruitment of tenants for the mall began **Downtown became the host for the farmer's market and the bicentennial was celebrated** • The Oneonta Farmers Market is opened at the Market Street parking garage and is later moved to Main Street • A large parade was held on Main Street to mark the nation's 200th anniversary
1978	**Another downtown department store moves from downtown** • September – Sears, Roebuck and Co. located at 222 Main Street closed its doors • A "Save our Sears" campaign was conducted but proved to be unsuccessful
1979	**Downtown development group is identified** • A group known as the "Downtown Developers" were retained as the primary developer for a 240,000 square foot downtown mall project • Groundbreaking was announced several times, only to be rescheduled
1980	**The downtown mall started and then stopped** • Construction continued to be anticipated by May for a downtown mall which was to include two anchor department stores and a grocery store • JC Penney rejected the proposal to locate in the downtown mall citing a commitment to another site in the local area • Citizens Development Corporation – a local group of business owners took over the tenant recruitment responsibilities for the downtown mall **The downtown streetscape was upgraded** • Brick pavers, planters trees, and ornamental street lights were installed along Main Street to enhance the vintage look of the downtown area • $1.3 million in Urban Renewal funds was used to make the improvements and Main Street was officially opened with its new look on November 20th

[6] Ibid

	Affordable housing comes to downtown • September – The Oneonta Housing Authority announced plans for a $2 million, 30-unit complex that was to be targeted for small families that met income guidelines – the complex was completed by November of the following year at the corner of Fairview Street and Academy Street • The complex is known today as the James F. Lettis Apartments in honor of the former mayor who helped secure funding for the project
1981	**Southside Mall is constructed** • The plans for the estimated $8 million mall were revealed in May • JC Penney and K-Mart are revealed as anchor tenants with a Great American grocery store included – JC Penney had been a downtown retailer since the early part of the 20th century • Citizens Development Corporation attempted to block the project in court but the effort was dismissed • Ground is broken for the Southside Mall on December 3rd • Citizens Development Corporation acknowledged that a downtown mall would not be built but they shifted their focus to "other methods" to keep downtown competitive in the marketplace
1983	**Downtown rehabilitation continues** • Rehabilitation of the "Ford Block" at 202 Main Street and the former City Hall at 242 Main Street began and later the State Supreme Court, the NYS Department of Motor Vehicles and the Mental Health Center moved into the space at 242 Main Street. **June 28th – The Southside Mall opened for business**
1984	**More investment is made in downtown Oneonta** • The City received a $1 million federal grant, a portion of which was used to develop apartments on the upper floors of downtown buildings • The downtown pedestrian walkway and arcade opened connecting Main Street with the Market Street Parking Garage
1985	**Improvements to buildings along Main Street in downtown continue** • After more than two years of delay improvements began on the "Ford Block" from 180-202 Main Street – the owner announced that four buildings will be improved
1987	**Affordable senior housing is added in the downtown area** • A 28 unit complex opened on Academy Street known as the Academy Arms Apartments
1989	**Improvements spread to include property on Market Street** • The former D&H freight house was renovated to accommodate commercial office space on the first floor with apartments on the second floor **Southside development continues** • More retail development is proposed along NYS Route 23 in the Town of Oneonta – the project involved cuts and fills of land on both sides of the road – the sites eventually hosted Walmart, and the Aldi and Hannaford grocery stores as each opened in the early-to-mid 1990's
1993	**The railroad roundhouse is demolished** • The former D&H roundhouse – the largest in the world, built in 1906, and abandoned in 1954 – was demolished on December **The Southside commercial area is expanded** • The Daily Star reports that several new shopping centers are gravitating to the Southside Mall area • Shop 'N Save (Hannaford) and Walmart are among the stores that are constructed
1994	**Downtown's long standing department stores are closed** • The FW Woolworth store closed in January after 75 years in downtown • By the end of June, Bresee's Department Store was closed after having been in business in downtown Oneonta since 1899 • The store reopened as Bresee's Kitchen, Furniture and Bath but it closed permanently in 2005 **The Downtown Oneonta Improvement Task (DOIT) was formed** • The group received a $10,500 grant to study local shopping patterns and entice businesses to come into the City • The group planned on doing more downtown promotional activities **The Southside Mall owned by the Pyramid companies was sold** • December – The vacant mall is purchased by Eugene Bettiol, Jr.

1995	**The Oneonta Armory – today known as the Asa C. Allison Municipal Building was named to the National Register of Historic Places**
1996	**The last remaining railroad jobs in the City are lost** • CP Railway which had previously purchased the site announced that the last maintenance shop was closed on February 16th and the last 28 jobs at the site would be terminated • The Oneonta Rail Yards had been a railroad maintenance, construction and commerce hub since 1871 beginning with the D&H Railway
1997	**The City's first "First Night" event is held in downtown** • The event featured 22 entertainment venues • The event continued through December 31, 2006
1998	**The Oneonta Yankees win their 12th and final NY Penn League Championship** • The team moved from Damaschke Field to Staten Island and the affiliation with the Detroit Tigers started the following year
2000	**Construction of a major entertainment venue is announced for downtown** • September 28th – A 39,000 square foot arts and conference center is to be constructed along Market Street on the site of the former Nesbitt feed mill at a cost of approximately $37 million • The center will be called the Foothills Performing Arts Center **July 10th – Construction of new downtown hotel began on the "Urban Renewal Lot"** • The cost is $4.8 million
2001	**Downtown once again, is the place where the community comes together** • September 11th – Hundreds gather in front of City Hall at 258 Main Street for a candlelight vigil following the attacks on the World Trade Center and the Pentagon  *Figure 5 - A Candlelight Vigil is Held on Main on 9/11/2001*
2002	**The vacant "Urban Renewal Lot" in downtown became occupied** • December 7th – The downtown Clarion hotel opened with 78 rooms • The location of the hotel was originally planned as the site for the downtown mall in 1976
2003	**The Southside shopping area experienced further change** • The Kmart store closed • Plans for a Home Depot and Lowes were announced **The former Armory on Academy Street was purchased** • The City purchased the building from New York State for $1 **The historic significance of downtown Oneonta is recognized** • The City receives historic designation for 22 properties
2004	**The former armory gained a tenant** • November – The Oneonta Community Alliance for Youth opened at the site **A tourism center opened in downtown and closed several years later** • June – The Regional Visitor Center opened at 254 Main Street • The center closed in September of 2007
2005	**The Foothills Performing Arts Center completed the addition of a scene shop building** • A 10,300+ square feet scene shop building is added onto the Foothills Performing Arts Center **The Greater Oneonta Historical Society opened an office and exhibit in downtown** • After several years of building renovation the society opened its doors at 183 Main Street **Bresee's Kitchen, Furniture and Bath is closed** • December 30th – The store closed permanently
2008	**The Foothills Performing Arts was expanded again** • A 618 seat auditorium and atrium was added to the center which is now known as the Foothills Performing Arts and Civic Center

2009	**The former Oneonta Theater at 47 Chestnut Street was purchased** • Thomas Cormier purchased the theater and working in conjunction with the Friends of the Oneonta Theater renovation of the stage and screens began • The theater reopened in August of the following year
2010	**New York Collegiate Baseball comes to Damaschke Field** • January 27th – The Oneonta Tigers announced that the team is moving to Connecticut • February 16th – The Oneonta Outlaws will replace single A baseball and will play in the collegiate league **The City is "rebranded"** • August – As a means to promote the arts in downtown the "Life Enjoyed" brand was unveiled after being developed by The Glen Group of New Hampshire for a cost of $20,000 **The First Night celebration returns** • After a three year absence first night is celebrated on December 31st
2011	**Downtown is promoted as a place and destination for the arts** • Mayor Dick Miller called for the arts community in the area to organize themselves as a major economic engine that benefits the entire City **October – "Occupy Wall Street" rallies took place at Muller Plaza**
2013	**The Bresee's building was transformed** • October – The former Bresee's Department Store building was transformed into a mixed use building with retail on the first floor and 15 apartments on the second and third floors **Student housing was planned for a site outside of downtown** • A privately-owned complex consisting of 325 apartments to be known as "Hillside Commons" was proposed for Blodgett Drive and was to be marketed to students of SUNY Oneonta **The Palace Cigar Store – a fixture in Oneonta since the 1920's – closed its doors at 277 Main Street**
2015	**The site of the former Oneonta Sales building on Market Street is to be transformed** • December – Otsego Now on behalf of the City received approval of a grant to begin the transformation of the site into a regional "food hub" to be called the Upper Susquehanna Agricultural Center

The timeline as outlined above is evidence that downtown Oneonta is a uniquely special place as it is the foundation upon which the wider community and region has been built. Few community centers are as representative and emblematic of the essence and character of its residents as downtown Oneonta. Downtown Oneonta is the central place where residents come together as a community. It is the recognized place from which the collective voice of the community is expressed. People have come downtown to support fellow residents as they leave in service to their country, and celebrate them as they return, or mourn in recognition of the ultimate sacrifice made. They have come downtown in prideful celebration of advancements as a community, or to simply enjoy an event, performance, or a meal in the friendly and recognizable confines of their hometown.

Strong bonds resident-to-resident, and between the residents and downtown – the central place where celebration occurs, community pride is demonstrated, and points of view are expressed – have formed. These bonds are the strands that are woven together and over the course of time, become the fabric that is the strength of the community. Downtown as demonstrated in the historical highlights above has been integral in the development of the City as a *community* of residents. Downtown will continue to provide the place from which, and the infrastructure by which these bonds are created, strengthened, and expanded. The strategy for downtown to thrive in the future, as outlined in the following plan is based upon recognition of the unique role that downtown will continue to play in advancement and prosperity of the City and the wider region.

III. METHODOLOGY FOR STUDY DEVELOPMENT

A. Introduction

As demonstrated in the accounting of some of the highlights from downtown Oneonta's history the functionality and performance of downtown area are crucial elements to the City as a whole.
The historical events presented demonstrate that the bond between the residents and the downtown area run deep. Downtown Oneonta is representative of the City's condition on a variety of levels – economic, cultural, and social. In the particular case of Oneonta the City has two fundamental characteristics that have served to maintain a high level of stability when compared to other similar areas in Upstate New York. These characteristics are:

- The presence of two colleges in accessible distances to downtown contributes to a baseline of economic activity and overall vibrancy.
- A geographic position that contributes to the downtown area serving as a genuine urban center not just for the City but for the wider region. Meaning that downtown Oneonta is the recognized center services (medical, professional and governmental) that are fundamentally important to the day-to-day life of residents of the region.

Table 2
City of Oneonta
Decennial Population
1870-2010, 2014

City of Oneonta Historical Population		
Census	**Pop.**	**%±**
1870	1,061	—
1880	3,002	182.9%
1890	6,272	108.9%
1900	7,147	14.0%
1910	9,491	32.8%
1920	11,582	22.0%
1930	12,536	8.2%
1940	11,731	−6.4%
1950	13,564	15.6%
1960	13,412	−1.1%
1970	16,030	19.5%
1980	14,933	−6.8%
1990	13,954	−6.6%
2000	13,292	−4.7%
2010	13,901	4.6%
2014	13,906[2]	<.01%

However, as strong as these attributes have been the City is not fully insulated from the long-term trends that are affecting other urban centers in Upstate New York. For example, basic population trends among many communities in Upstate New York, particularly among urban centers have demonstrated a flattening of growth or in some instances outright decline. A review of the population pattern of the City of Oneonta since 1870 reveals that strong growth occurred through 1970 when the City reached its historical population peak at just over 16,000 persons. In the 44 years since that timeframe, and up through 2014, the City population has declined substantially and most recently (since 2010) the level has stabilized at an estimated 13,906 persons by 2014.

To have a 2014 population that is approximately equivalent to the level from 1950 (13,564 persons) is a daunting circumstance in consideration of the fact that $100 in 2014 dollars has the same buying power $10 in 1950.
The population level throughout this 64 year period is essentially unchanged while the cost for goods and services has increased tenfold. Point being, the dynamics of the economy within the City have changed – the prospect of assuming that growth in the demand for goods and services that results from a growing population will exceed, or even keep pace, with the rate of inflation can no longer be assumed. Therefore, new strategies must be formed to promote growth of the City's economy through the continued evolution of the downtown area.

The intent of this study is to provide a basis of understanding for this current reality and to set forth a strategy for downtown to not only sustain within the current reality but prosper.

The first steps in the study's development are to define the geographic boundary; in other words for the purposes of this study – what constitutes the downtown area. The next step is to understand the characteristics of the downtown, the context in which it functions, and determine the resulting needs. Once the context is understood and the needs are determined, a strategy is then developed to address the needs and achieve the overarching goal of prosperous downtown area that functions at a high level.

B. Study Area Boundary

"down·town /dounˈtoun/ -

> *Adjective: of, in, or characteristic of the central area or main business and commercial area of a town or city.*
> *Noun: the downtown area of a town or city. The part of a city or town where there are tall buildings, stores, offices, etc."*[7]

The study area boundary is important as it determines where the analytical focus will occur. As a general consideration the boundary of the downtown area was initially determined as a result of an analysis of the land use pattern emanating from Main Street. Having parcels characterized by a high concentration of multi-story buildings on narrow lots with a high level of building coverage, frontage on a wide sidewalk separating the front building wall and the right-of-way, and "zero lot line" side yards or side yards with little or no dimensional separation and shared building walls. Land uses are characteristically dense and mixed across a spectrum of: residential (rental and owner-occupied), commercial-retail, commercial-service, institutional, civic, accessory uses (e.g. municipal parking), and recreational uses. This pattern extends throughout the study area which is bounded by Fairview Street, Watkins Avenue, and a section of Chestnut Street, Wall Street, and a section of Dietz Street, Walnut Street, Elm Street, and Grand Street. The boundary of the Study Area is shown on Map 2.

C. Community Engagement

A multifaceted public engagement program was employed to establish an understanding of the characteristics of downtown and how it functions. The specific facets of the engagement program included:

- Stakeholder Interviews – Interviews were conducted with City officials and staff, business owners of downtown businesses, leadership of downtown business associations, the historical society and the chamber of commerce, and county-based industrial development agency.
- Focus Group Meetings – small group discussions of 8-10 persons were held among three relevant groups to the downtown area: Residents, business owners, and property owners.
- Consumer Survey – A survey instrument consisting of approximately 20 questions oriented towards the spending and shopping patterns and preferences of respondent consumers was developed and dispersed electronically via the City's website and as a hard copy accessible at City Hall and several downtown businesses. Respondents to the survey totaled 1,332 persons from across the City and wider region. The responses to the survey were then tabulated and produced in a standalone report (see Appendix B).

The information derived from the public engagement program was utilized as resource data to the economic and market analysis and the overall strategy itself.

[7] Merriam-Webster: http://www.merriam-webster.com/

IV. MARKET AND ECONOMIC ANALYSIS

A. Introduction

The City of Oneonta retained ConsultEcon, Inc. as a part of a multi-disciplinary team led by The LA Group to provide market and economic analysis of Oneonta's Main Street and Downtown area as an input into to a comprehensive economic planning and development strategy. According to the request for proposals, "the goal of the study is to develop short, middle, and long range plans for a sustainable economic strategy for Downtown Oneonta by concentrating on its assets-both existing and potential." The market and economic analysis contained in this report is informed by work performed by The LA Group and ConsultEcon that includes housing research and analysis, community visioning and outreach, stakeholder interviews, focus groups with businesses, property owners and residents, and a community wide consumer survey.

B. Assumptions

In preparing this report, the following assumptions were made, and this study is qualified in its entirety by these assumptions.

1. Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. and the LA Group from independent research efforts, general knowledge of the industry, and consultations with the client. No responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study. No warranty or representation is made that any of the projected values or results contained in this study will actually be achieved. There will usually be differences between forecasted or projected results and actual results because events and circumstances usually do not occur as expected. Other factors not considered in the study may influence actual results.
2. This report was prepared between October 2015 and April 2016. It represents data available at that time.

C. Existing Conditions in the Regional Economy and Downtown

This section provides key existing economic conditions in downtown Oneonta, the local area and region.

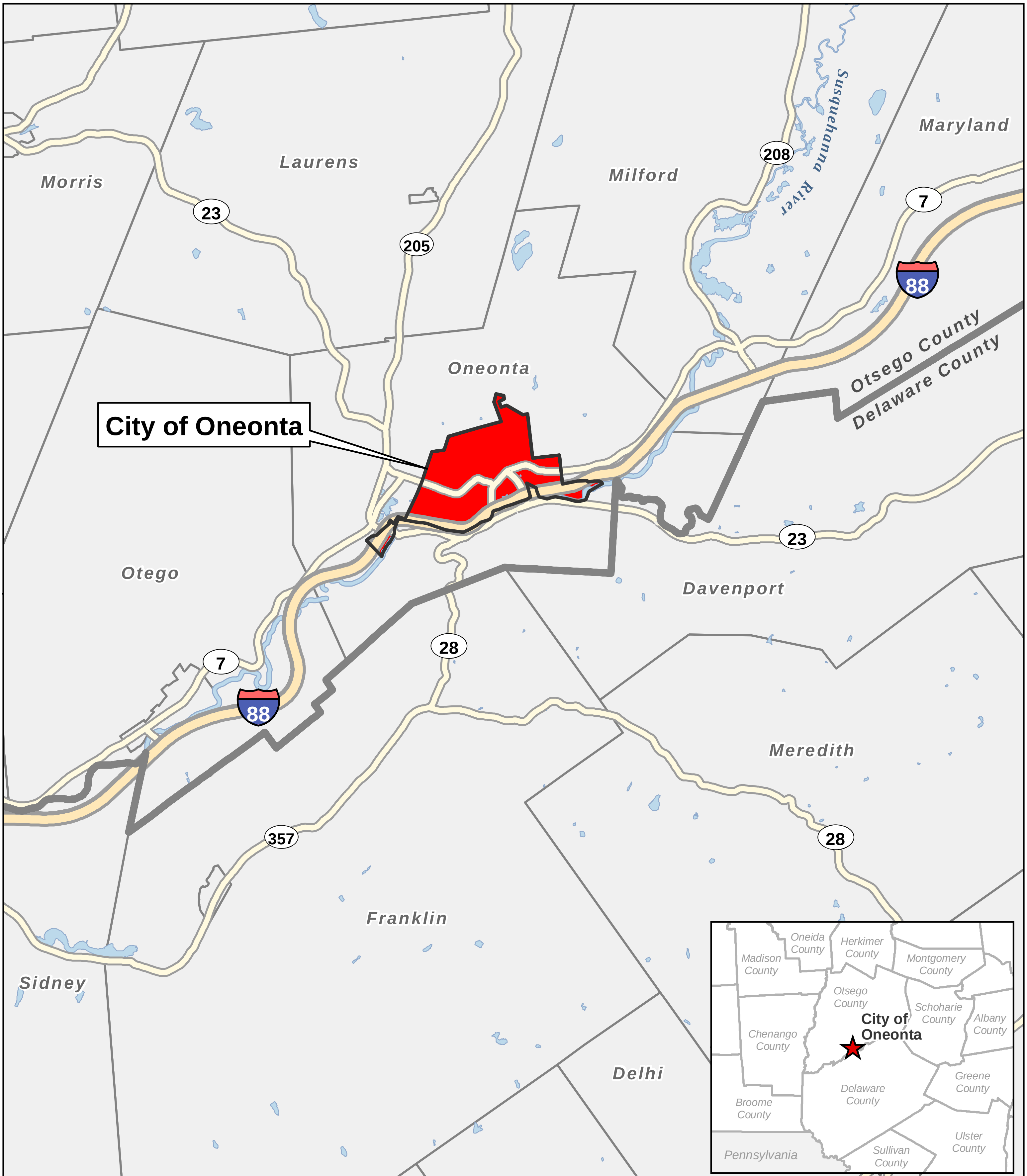
1. <u>Location</u>
   Oneonta is located in Upstate New York on Interstate 88 roughly halfway between Albany and Binghamton, each city approximately one hour's drive away. With a population of 13,838, it is centrally located and the only city in Otsego County, a rural county with a population of 62,259. It is home to two colleges-Hartwick College and SUNY-Oneonta—that feature prominently in the local economy. The City of Oneonta is located in the center of Otsego County (see Map 1).

2. <u>Study Area</u>
   The Study Area comprises commercial and residential neighborhoods in the City's historic core. Its physical boundaries are largely defined by street's edge, except to the south which aligns with railroad tracks that separate downtown from park. This is defined by the City of Oneonta and The LA Group in Map 2.

3. Community and Economic Assets
   Located nearby and in adjacent areas to the Study Area, important locations that function as community and economic assets, shown in Map 3 and include:
   - Study Area / Downtown
   - Neahwa Park
   - SUNY Oneonta
   - Hartwick College
   - Southside Mall
   - Route 28
   - Rail Yards

4. Economic Area Definitions
   For the purposes of this existing conditions analysis, the following economic area definitions are used:
   - Region – Otsego and Delaware Counties. See Map 1.
   - Local Area – City and Town of Oneonta, or the area's zip code, depending on the source used.
   - Downtown – Two census block groups, which are a proxy for the study area defined by The LA Group and the City of Oneonta. (While this does not align perfectly with the Downtown Study Area defined for the project, it is a reasonable proxy and enables comparison with the Local Area and Region.)

5. Downtown and the Regional Economy
   Downtown Oneonta is the center of commerce and community life in the regional economy that spans Otsego and Delaware counties. The City of Oneonta is a central city in Otsego County, and is entirely surrounded by the Town of Oneonta which contains a nearby resident and worker population. Together the City and Town of Oneonta comprise the Local Area, as an agglomeration of businesses, government and civic institutions that are regionally serving. The Local Area and regional economies are anchored by two colleges, SUNY-Oneonta and Hartwick College, two of the largest employers in Otsego County and important drivers of residential population churn in the region and steady tourism to the community. Many residents of the region go Downtown for work and for dining, shopping and entertainment on a regular basis. Therefore, Downtown Oneonta is an integral part of the region's economy.



0 1 2 Miles

City of Oneonta - Focus on the Future of Main Street: Economic Development Planning Study

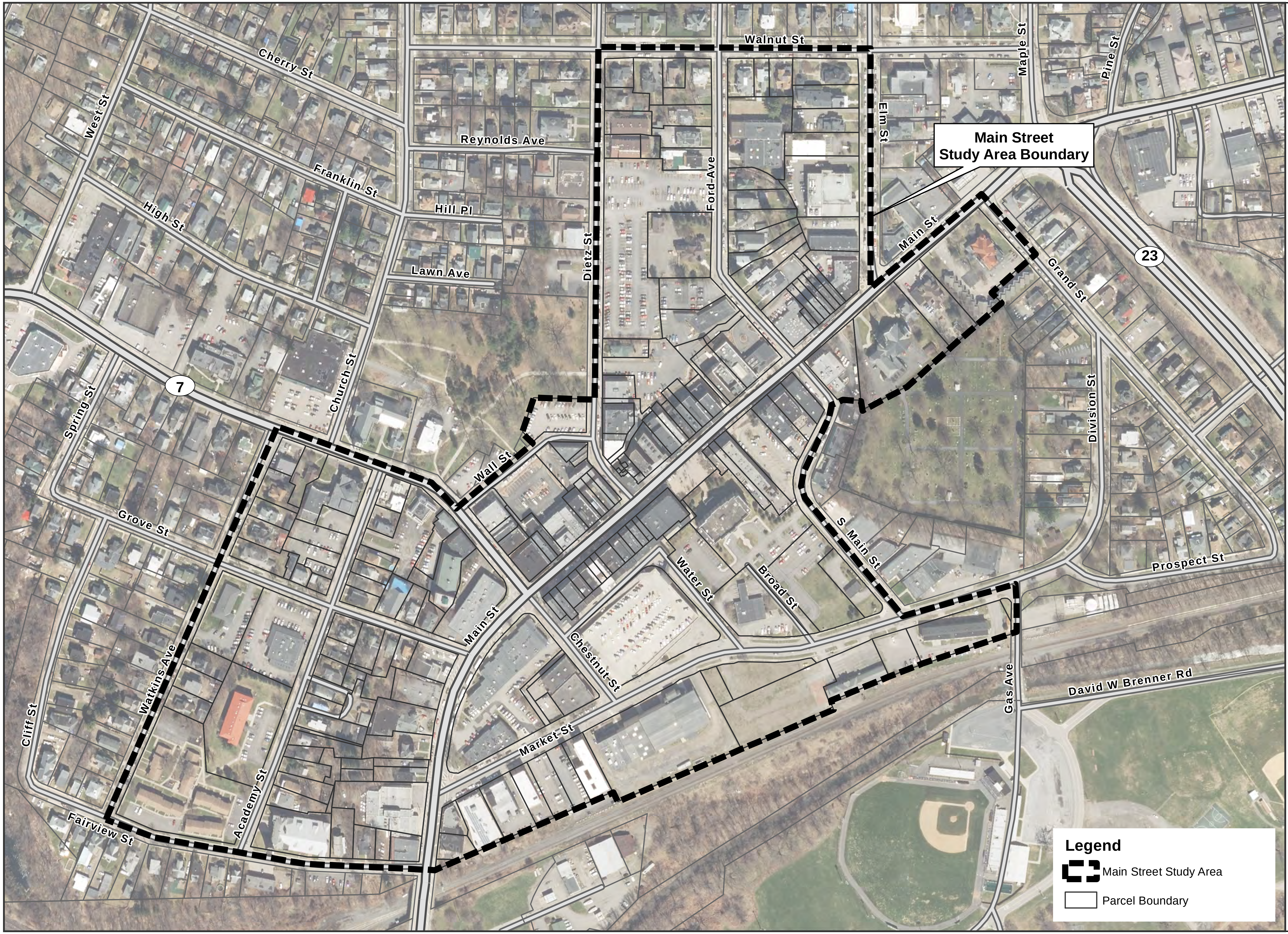
Title

Map #1: Regional Location Map

The LA GROUP
Landscape Architecture & Engineering P.C.
People Purpose Place

Project 201567

Date 04/11/2016



The LA GROUP
Landscape Architecture & Engineering PC
People. Purpose. Place.

40 Long Alley
Saratoga Springs
New York 12866
p: 518/587-8100
f: 518/587-0180
www.thelagroup.com

City of Oneonta - Focus on the Future of Main Street: Economic Development Planning Study

Title
Map #2: Study Area Map

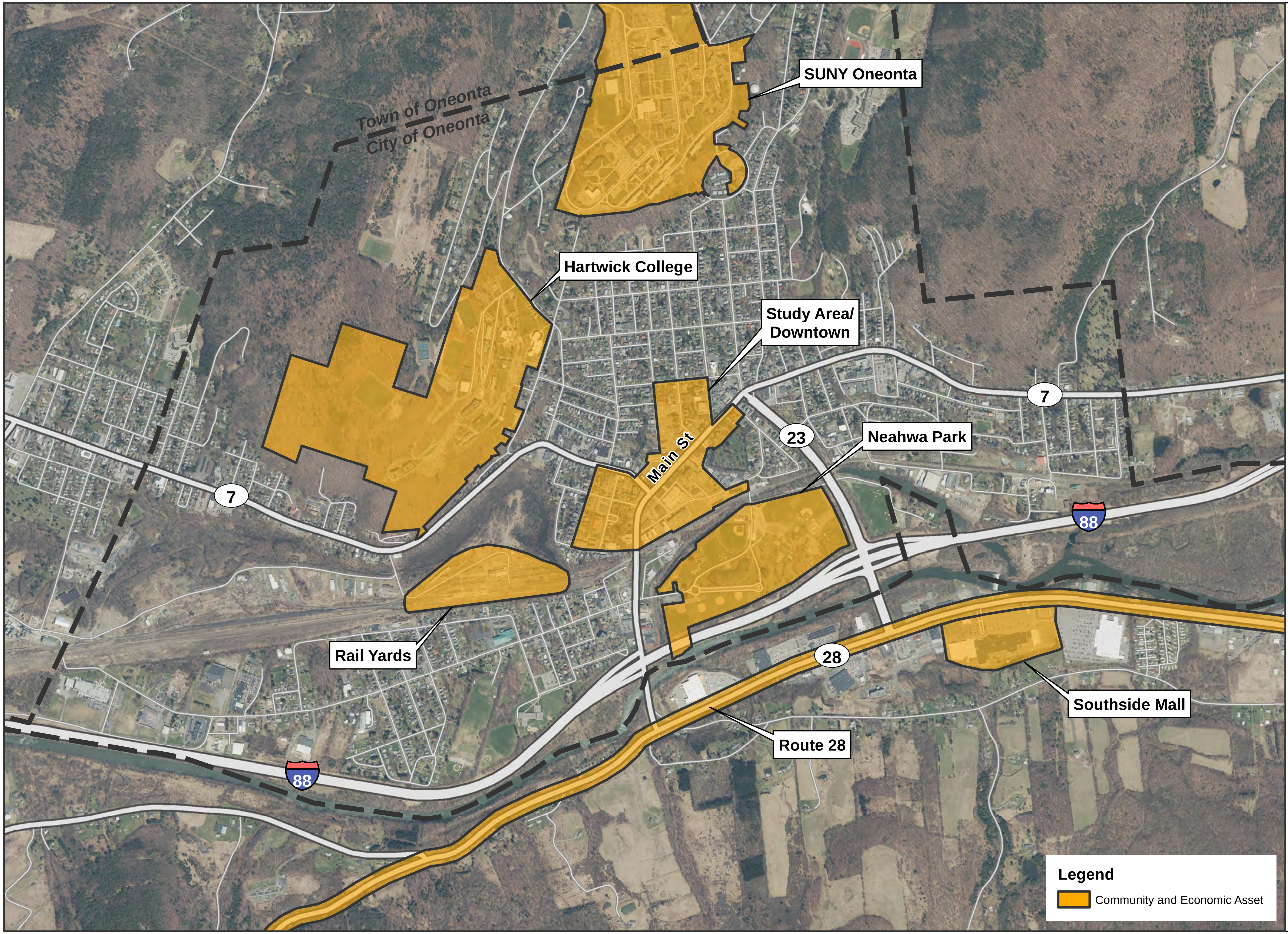
1 inch = 250 feet

0 125 250

Feet

Project: 201567

Date: 04/11/2016



City of Oneonta - Focus on the Future of Main Street: Economic Development Planning Study

Title
Map #3: Community and Economic Asset Map

The LA GROUP
Landscape Architecture & Engineering P.C.
People. Purpose. Place.

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New York 12866

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www.thelagroup.com

0 500 1,000
Feet

Project: 201567
Date: 04/11/2016

6. Regional Employment Trends
   In 2014, there was an estimated 28,500 people employed in Otsego County and 18,900 in Delaware County, for total regional employment of 47,400.[8] Employment in Otsego County has remained level since 2010. The unemployment rate, however, has fluctuated as workers have dropped in and out of the labor force. In Delaware County, employment declined 8 percent between 2010 and 2014. The unemployment rate has been consistently higher in Delaware County than Otsego County in the recent period. Employment is seasonal in the region's economy, with higher employment levels in the summer months and lower employment levels during winter months. This seasonal variation is likely due to the impact of tourism on the region which peaks during summer months. Unemployment rates are highest in January, February and March, right after the holiday hiring surge, but before the spring and summer tourist season picks up.

7. Regional Employment Trends
   Data in Table 3 summarizes the population trend and projected populations for Otsego and Delaware counties, as well as New York State, for the decades between 1990 and 2040. The data shows that the Otsego and Delaware county area saw a small amount of growth in the 1990s. It is projected to see a decline in population in the coming decades. New York State, by comparison, saw growth and is projected to see growth into the 2020s, but is projected to decline in the 2030s. Figure 6 is a chart illustrating the population levels in Otsego and Delaware Counties.

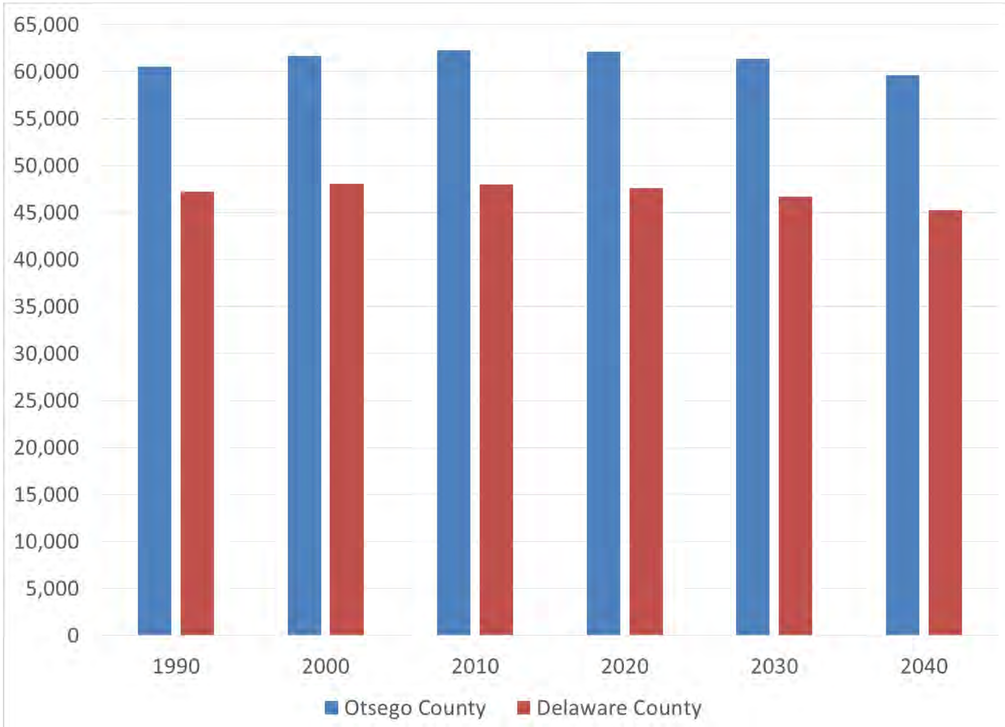
Table 3
Population Trend and Projections, 1990-2040
Otsego County, Delaware County, New York State

Area	1990	2000	2010	2020	2030	2040
Otsego County	60,517	61,676	62,259	62,094	61,343	59,637
Delaware County	47,225	48,055	47,980	47,623	46,717	45,247
New York State	17,990,455	18,976,457	19,378,102	19,697,021	19,794,733	19,623,506
Percent Change from Previous Decade						
Otsego County		1.9%	0.9%	-0.3%	-1.2%	-2.8%
Delaware County		1.8%	-0.2%	-0.7%	-1.9%	-3.1%
New York State		5.5%	2.1%	1.6%	0.5%	-0.9%

Source: Cornell University Program on Applied Demographics; ConsultEcon, Inc.

8 Source: Local Area Unemployment Statistics (LAUS), New York State Department of Labor.

Figure 6
Population Trend and Projections, 1990-2040 for
Otsego and Delaware Counties



Source: Cornell University Program on Applied Demographics.

8. <u>Local Area Economy</u>
   The Local Area encompassing the City and Town of Oneonta functions as a unified economic place in the region. Downtown Oneonta is the historic employment center and shopping area, whereas, the Southside (of the railroad, river and highway) contains the Southside Mall and other large format, big box retail stores and restaurants. Downtown and Southside businesses compete with one another for local and regional consumer expenditures. Southside stores are more accessible from the highway, but many Local Area employers are located Downtown. It is notable that the colleges are on the north side of the Local Area giving Downtown additional visibility among commuters traveling to and from the highway interchanges to the campuses.

   a. Colleges

SUNY Oneonta and Hartwick College are major employers in the Local Area.

- SUNY-Oneonta has a 250-acre main campus. Student enrollment is 6,101, with female students comprising 61% and male students 39%. There are 430 full and part time faculty members at the college. According to college's Budget Office documents, the number of full-time equivalent employees increased from 863.85 to 889.95 between the 2008-2009 and the 2015-2016 school years. Total payroll increased over the same period from $44.1 million to $51.6 million.
- Hartwick College is a four-year, private liberal arts and sciences college on a 425 acre main campus in Oneonta. Its 1,507 students come from 26 states and 25 countries, with female students comprising 61% and male students 39%. A reported 77% of Hartwick students live in

College on-campus housing. There are 200 full and part time faculty members at the college. Wages paid by the college totaled $20.7 million for the year ending June 30, 2013, according to IRS tax filings.

b. Employment Mix in Local Area and Downtown

Data in Table 4 show the distribution of jobs by industrial sector.

Table 4
Employment Distribution by NAICS Industry Sector
in the Downtown and the Local Area, 2013

	Downtown		Local Area		Downtown Share of Local Area Employment
NAICS Industry Sector [1/]	**Jobs**	**Percent to Total**	**Jobs**	**Percent to Total**	
Agriculture, Forestry, Fishing and Hunting	0	0%	3	0%	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	36	0%	0%
Utilities	30	2%	182	2%	16%
Construction	8	0%	139	1%	6%
Manufacturing	30	2%	452	4%	7%
Wholesale Trade	51	3%	275	2%	19%
Retail Trade	175	10%	1,700	15%	10%
Transportation and Warehousing	17	1%	127	1%	13%
Information	28	2%	179	2%	16%
Finance and Insurance	66	4%	153	1%	43%
Real Estate and Rental and Leasing	90	5%	175	2%	51%
Professional, Scientific, and Technical Services	139	8%	417	4%	33%
Management of Companies and Enterprises	58	3%	67	1%	87%
Administration & Support, Waste Management and Reme	0	0%	173	2%	0%
Educational Services	39	2%	2,262	20%	2%
Health Care and Social Assistance	261	15%	2,400	21%	11%
Arts, Entertainment, and Recreation	29	2%	112	1%	26%
Accommodation and Food Services	365	21%	1,656	15%	22%
Other Services (excluding Public Administration)	133	8%	289	3%	46%
Public Administration	249	14%	377	3%	66%
Total	**1,768**	**100%**	**11,174**	**100%**	**16%**

1/ NAICS = North American Industrial Classification System.
Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2013).

c. Downtown

In 2013, there were an estimated 1,800 jobs in the Downtown, as shown by data in Table 3. The top five industries for jobs in the Downtown economy accounted for 67 percent of all jobs and included:

- Accommodations and Food Services– 365 jobs, 21% of all jobs
- Health Care and Social Assistance – 261 jobs, 15% of all jobs
- Public Administration – 250 jobs, 14% of all jobs
- Retail Trade – 149 jobs, 10% of all jobs
- Professional, Scientific, and Technical Services – 139 jobs, 8% of all jobs

d. Local Area

In 2013, there were an estimated 11,200 jobs in the Local Area, which represents approximately 2 of every 5 jobs in the County. The top five industries for jobs in the Local Area economy accounted for 76 percent of all jobs and included:

- Health Care and Social Assistance – 2,400 jobs, 21% of all jobs
- Educational Services – 2,260 jobs, 20% of all jobs
- Retail Trade – 1,700 jobs, 15% of all jobs
- Accommodations and Food Services – 1,660 jobs, 15% of all jobs
- Manufacturing – 450 jobs, 4% of all jobs

e. Downtown Share of Local Area Employment

Downtown's share of Local Area employment is largest in the following industries:

- 87 percent in Management of Companies and Enterprises with 58 jobs
- 66 percent in Public Administration with 250 jobs
- 51 percent in Real Estate and Rental and Leasing with 90 jobs
- 46 percent in Other Services (except Public Administration) with 133 jobs
- 43 percent in Finance and Insurance with 66 jobs

f. Jobs by Age and by Earnings

Data in Table 5 shows the distribution of jobs by age group and by earnings group. Half of all jobs in the Local Area are held by workers between 30 and 54. Approximately 38 percent of jobs have earnings from $1,251 to $3,333 per month. The distribution of jobs by age group in Downtown Oneonta is virtually the same as the distribution in the Local Area. Earnings in Downtown Oneonta are somewhat lower than that of the Local Area as a whole, with 43 percent of jobs earning less than $1,250 per month.

Table 5
Employment Distribution by Age Group and by Earnings, 2013
in the Downtown and the Local Area

	Downtown		Local Area		Downtown Share of Local Area Employment
	Jobs	**Percent to Total**	**Jobs**	**Percent to Total**	
Jobs by Worker Age					
Age 29 or younger	499	28%	3,038	27%	16%
Age 30 to 54	885	50%	5,567	50%	16%
Age 55 or older	384	22%	2,569	23%	15%
Total	**1,768**	**100%**	**11,174**	**100%**	**16%**
Jobs by Earnings					
$1,250 per month or less	759	43%	3,635	33%	21%
$1,251 to $3,333 per month	621	35%	4,231	38%	15%
More than $3,333 per month	388	22%	3,308	30%	12%
Total	**1,768**	**100%**	**11,174**	**100%**	**16%**

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2013); and ConsultEcon, Inc.

g. Local Area Employment Inflow-Outflow

The Local Area is a net importer of jobs. In 2013, there were an estimated 11,200 jobs and 6,300 working residents that live in the Local Area, indicating a net inflow of 4,900 jobs. Approximately 2,300 residents lived and worked in the Local Area in 2013. Therefore, 8,900 workers lived outside the area and commuted. Conversely, 4,100 people lived inside the Local Area and commuted out of the area.

h. Downtown Employment Inflow-Outflow

Analysis of employment indicates that downtown is also a net importer of jobs. In 2013, there were an estimated 1,800 jobs of which, approximately 900 were workers residing in the Local Area, indicating a net inflow of 900 jobs. Furthermore, approximately 100 residents lived and worked Downtown in 2013. Therefore, 1,700 workers lived outside Downtown and commuted. Conversely, 900 people lived inside the Downtown area and commuted to jobs outside the area.

i. Downtown Business Mix

Downtown is an important part of the Local Area economy. There were 184 businesses inventoried in Downtown Oneonta as a part of the existing conditions analysis, as shown by data in Table 6. The top five sectors account for almost 4 out of 5 businesses in downtown. The most common types of businesses present in downtown are:

- Retail Trade (24%)
- Accommodation and Food Services (21%)
- Other Services (19%)
- Arts Entertainment and Recreation (7%)
- Health Care and Social Assistance (7%)

Table 6
Distribution of Ground Floor and Upper Floor Businesses
by Selected Sectors in Downtown Oneonta, Businesses by NAICS 1/
Ranked Highest to Lowest Number of Businesses in each 2-digit NAICS code 1/

NAICS 1/	Sector	Number of Businesses	Percent to Total Businesses	Square Feet	Percent by Square Feet	Average Size in Square Feet
44-45	Retail Trade	43	23.5%	118,537	15.4%	2,757
72	Accommodation & Food Services	39	21.3%	141,950	18.4%	3,640
81	Other Services (except Public Administration)	34	18.6%	117,268	15.2%	3,449
71	Arts, Entertainment & Recreation	13	7.1%	80,644	10.5%	6,203
62	Health Care & Social Assistance	12	6.6%	56,637	7.3%	4,720
54	Professional, Scientific & Tech Services	11	6.0%	13,712	1.8%	1,247
61	Educational Services	8	4.4%	78,475	10.2%	9,809
52	Finance & Insurance	8	4.4%	64,192	8.3%	8,024
92	Public Administration	6	3.3%	80,725	10.5%	13,454
48-49	Transportation and Warehousing	2	1.1%	4,073	0.5%	2,036
51	Information	2	1.1%	6,054	0.8%	3,027
31-33	Manufacturing	2	1.1%	3,507	0.5%	1,753
53	Real Estate, Rental & Leasing	2	1.1%	3,382	0.4%	1,691
56	Administrative & Support & Waste Management & Remediation Services	1	0.5%	1,673	0.2%	1,673
	Total Businesses	**183**	**100.0%**	**770,828**	**100.0%**	**4,212**

1/ Categories are representative of 2-digit codes from North American Industrial Classification System (NAICS). Certain categories are not shown as they are not present in the business inventory.
Source: Destination Oneonta; City of Oneonta, NY, LA Group; and, ConsultEcon, Inc.

j. Selected Consumer-Oriented Sectors

Data in Table 7 shows details on the composition of the selected consumer-oriented sectors in Oneonta. It is noted that these selected consumer-oriented sectors are the same as the top four sectors in the Downtown.

Table 7
Distribution of Ground Floor and Upper Floor Businesses by Selected Consumer-Oriented Sectors in Downtown Oneonta, Ranked Highest to Lowest Number of Businesses in each 3-digit NAICS code [1/]

NAICS [1/]	Sector	Number	Percent to Total	Square Feet	Percent to Total	Average Size in Square Feet
44-45	***Retail Trade***					
453	Miscellaneous Store Retailers	18	14.0%	45,616	10.0%	2,534
451	Sporting Goods, Hobby, Book, and Music Stores	11	8.5%	16,155	3.5%	1,469
448	Clothing and Clothing Accessories Stores	6	4.7%	11,878	2.6%	1,980
445	Food and Beverage Stores	5	3.9%	19,684	4.3%	3,937
442	Furniture and Home Furnishings Stores	1	0.8%	1,774	0.4%	1,774
443	Electronics and Appliance Stores	1	0.8%	21,758	4.7%	21,758
446	Health and Personal Care Stores	1	0.8%	1,673	0.4%	1,673
	Total Retail Trade	**43**	**33.3%**	**118,537**	**25.9%**	**2,757**
71	***Arts, Entertainment, and Recreation***					
712	Museums, Historical Sites, and Similar Institutions	5	3.9%	23,301	5.1%	4,660
713	Amusement, Gambling, and Recreation Industries	5	3.9%	17,397	3.8%	3,479
711	Performing Arts, Spectator Sports, and Related Industries	3	2.3%	39,945	8.7%	13,315
	Total Arts, Entertainment and Recreation	**13**	**10.1%**	**80,644**	**17.6%**	**6,203**
72	***Accomodations and Food Services***					
7225	Restaurants	34	26.4%	77,177	16.8%	2,270
7224	Drinking Places	3	2.3%	5,900	1.3%	1,967
721	Accommodations	2	1.6%	58,874	12.8%	29,437
	Total Accomodation and Food Services	**39**	**30.2%**	**141,950**	**31.0%**	**3,640**
81	***Other Services***					
812	Personal and Laundry Services	18	14.0%	27,581	6.0%	1,532
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	15	11.6%	86,622	18.9%	5,775
811	Repair and Maintenance	1	0.8%	3,065	0.7%	3,065
	Subtotal Other Services	**34**	**26.4%**	**117,268**	**25.6%**	**3,449**
	Total Businesses in Consumer-Oriented Sectors	**129**	**100.0%**	**458,400**	**100.0%**	**3,553**

NOTE: Does not include Finance, Insurance and Real Estate.
1/ Categories are representative of 3-digit and selected 4-digit codes from North American Industrial Classification System (NAICS). Certain categories are not shown because are not present in the business inventory.
Source: Destination Oneonta; City of Oneonta, NY, LA Group; and, ConsultEcon, Inc.

k. Retail Trade

Four types of retail stores dominate the retail trade in downtown: Miscellaneous Store Retailers (18 are the dominant store types in terms of number of businesses), Sporting Goods, Hobby, Book and Music Stores (11), Clothing and Accessories Stores (6), and Food and Beverage Stores (5).

l. Food Services

There are 34 restaurants in Downtown Oneonta, as well as 3 drinking places (bars). The wide variety of restaurants include a mix of quick service food that caters to the college segment, such as pizza and Chinese food, as well as sit down restaurants that are open for lunch and dinner. A regional chain Bombers Burritos will be opening downtown. Restaurants account for 26 percent of all consumer oriented businesses in the downtown.

m. Other Services

Other service businesses reflect Downtown's position as a civic and convenience center that contains important public and private institutions and businesses that meet the day to day needs and necessities of Oneonta residents. The number of religious, grant-making, civic, professional and similar organizations reflects downtown as the center of government and civic life.

n. Arts, Entertainment and Recreation

Despite their small numbers, downtown Oneonta has a relatively high number of arts, entertainment and recreational businesses. These businesses are destination anchors that have the potential to generate visitor spending and tourism that spills over to other businesses such as restaurants and accommodations. In addition, they typically occupy a large amount of site or building area. (Additional information on area attractions appear in the next section.)

o. Downtown Anchors

Downtown's anchors are its institutions/employers (banks, City, County, YMCA, etc.), its arts and cultural facilities, and its restaurants.

p. Retail Gaps

Gaps in the mix of businesses in downtown include under-represented and wholly missing retail categories. Under-represented retail categories in downtown Oneonta include:

- Furniture and Home Furnishings Stores
- Electronics and Appliance Stores
- Health and Personal Care Stores
- Gasoline Stations

Of the under-represented categories, Health and Personal Care Stores would be well suited to downtown markets. However, Rite Aid and Walgreens are located just outside the downtown study area and likely account for a good portion of sales in the category. In addition, stores in other categories, such as furniture stores and appliance stores, are typically looking for larger spaces because they have larger merchandise.

Missing retail categories in downtown Oneonta include:

- Motor Vehicle and Parts Dealers
- Building Material and Garden Equipment and Supplies Dealers
- General Merchandise Stores
- Non-store Retailers

None of the missing retail categories are particularly well suited to the smaller spaces available downtown. Many of these stores are located in the larger buildings and sites in the Southside of Oneonta.

q. Storefront Occupancy

A total of 155 of the 184 inventoried businesses are located in ground floor space. There were a total of 8 vacant storefronts available in Oneonta. Therefore, the vacancy rate in downtown Oneonta is less than five percent. This vacancy rate is low, indicative of healthy retail marketplace and high demand for space. Given the limited amount of space available, it is possible that rents may rise. Higher rents put pressure on businesses' bottom lines. For new and or untested businesses, high rents can cut into margins especially in critical early period of business startup, during which financing can be tenuous.

r. Summary

Downtown Oneonta is the center of commerce and community life in the regional economy that spans Otsego and Delaware counties. The local and regional economies are anchored by two colleges, SUNY-Oneonta and Hartwick College, which are two of the largest employers in the region and important drivers of residential population churn and steady tourism to the community. Many Oneonta residents go Downtown for work, dining, shopping and entertainment on a regular basis.
Therefore, Downtown Oneonta is an integral part of the region's economy.

The City of Oneonta, together with the Town of Oneonta, comprises the Local Area, an agglomeration of businesses, government and civic institutions that serve the region. The Local Area is a net importer of jobs. In 2013, there were an estimated 11,200 jobs in the Local Area and 6,300 residents that worked living in the Local Area, indicating a net inflow of 4,900 jobs. Approximately 2,300 residents lived and worked in the Local Area in 2013.

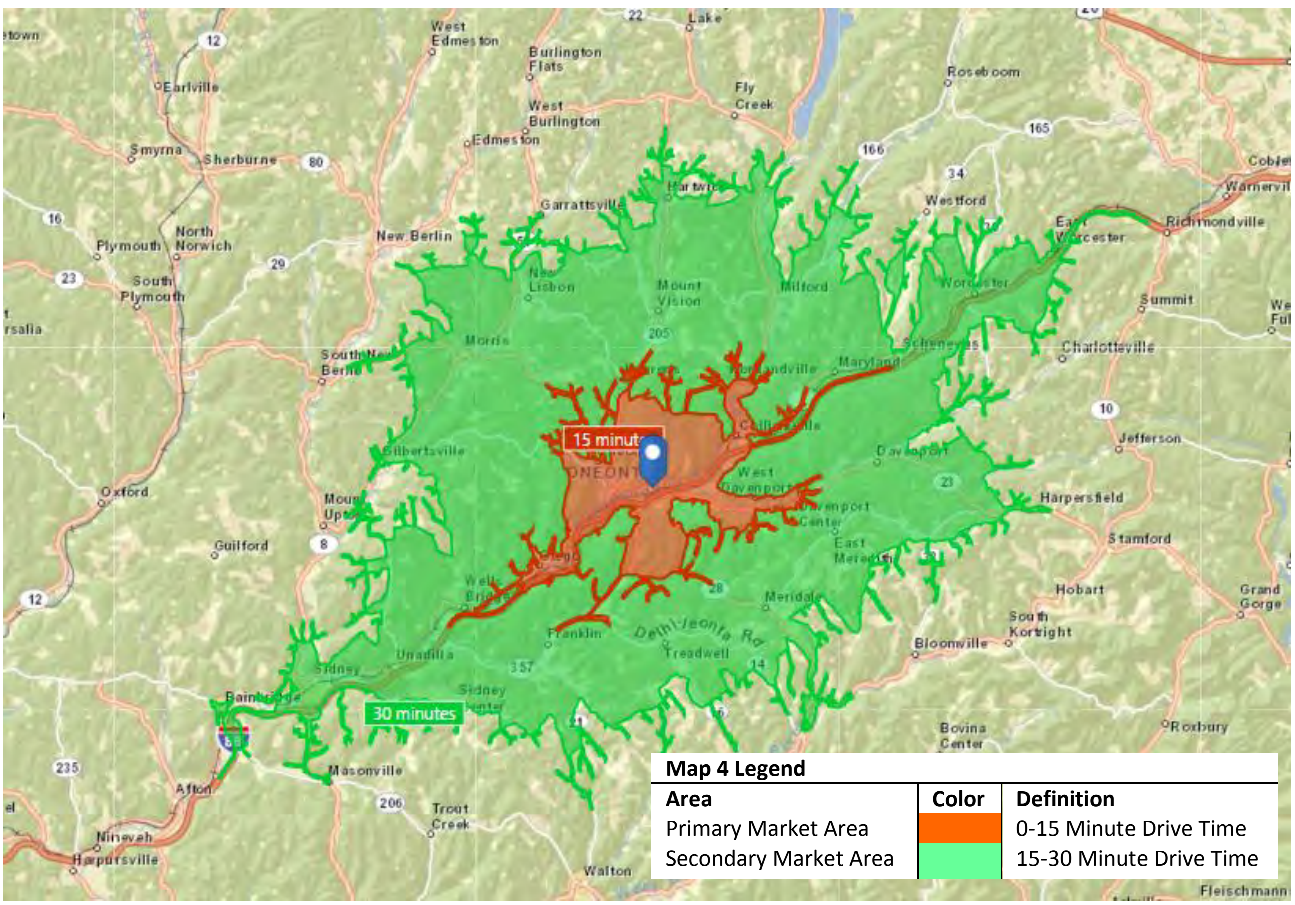
There are 184 businesses within the Local Area. The 129 businesses in the top four sectors are consumer oriented, and concentrated including Retail Trade (24% of all businesses), Accommodation and Food Services (21%), Other Services (19%), and Arts Entertainment and Recreation (7%). Downtown Oneonta's mix of businesses exhibit clusters in a broad array of specialty retailers, restaurants, personal services, government and civic institutions, and arts, entertainment and recreation. Downtown's anchors are its institutions/employers (banks, City, County, YMCA, etc.), its arts and cultural facilities, and its restaurants. Emerging clusters include Clothing and Accessories and Food and Beverage Stores. Ninety five percent of downtown storefronts are occupied, reflecting a high demand for space.

D. Market Analysis

This section reviews the resident and tourist market context for the project. It defines the resident market area for businesses in Downtown Oneonta, and profiles local and regional tourist markets including a review of accommodations, and visitor attractions.

<u>Market Area Definition</u>
The Resident Market Area for the project is defined as the area within a 30-minute drive of Oneonta. The Resident Market Area is further delineated into primary and secondary market areas; the primary market area is defined as the area within a 15-minute drive of downtown Oneonta, and the secondary market area is defined as the area beyond a 15-minute drive, but within a 30-minute drive of Oneonta. The definition is based on an informal survey of downtown businesses and economic developers' perceptions of where customers are coming from. According to downtown businesses, most customers come from within the Oneonta Resident Market Area. However, many businesses, particularly the restaurants, report having a good portion of customers from places such as Delhi, Sidney and Milford, which are up to 30 minutes away. Businesses in downtown Oneonta also benefit from tourist traffic, which peaks during the summer. Map 4 shows the Resident Market Area for Oneonta.

Map 4
Resident Market Area for Oneonta



Source: ESRI and ConsultEcon, Inc.

Resident Market Demographics

a. Population

Data in Table 8 shows the market area population trend compared to other jurisdictions for comparative purposes. The market area population is projected to be stable at 55,000 persons between 2015 and 2020. In 2015, Downtown Oneonta had an estimated population of 832, which was projected to decline slightly by 2 percent to 814 by 2020. This decline reflects the trend at the City and County levels. Over the same period between 2015 and 2020 the population of the New York State is projected to increase 2.1 percent and the population of the United States is projected to increase 3.8 percent. The short-term population trends in the Downtown, city and county are reflective of long-term population declines projected for the New York State as a whole.

Table 8
Population Trend, 2010-2020
Resident Market Area and Comparison Areas

Market Area	2010	2015	2020	% Change 2010 to 2015	% Change 2015 to 2020
Primary Market Area	23,690	23,603	23,381	-0.4%	-0.9%
Secondary Market Area	31,782	31,770	31,771	0.0%	0.0%
Total Resident Market Area	**55,472**	**55,373**	**55,152**	**-0.2%**	**-0.4%**
Comparison Areas					
Downtown Study Area	854	832	814	-2.6%	-2.2%
City of Oneonta	13,901	13,741	13,514	-1.2%	-1.7%
Otsego County Less Oneonta	*48,358*	*48,526*	*48,470*	*0.3%*	*-0.1%*
Otsego County	62,259	62,267	61,984	0.0%	-0.5%
NY State	19,378,102	19,704,032	20,119,871	1.7%	2.1%
United States	308,745,538	318,536,439	330,622,575	3.2%	3.8%

Source: U.S. Census Bureau for 2010; ESRI Population Projections, 2015, 2020; and ConsultEcon, Inc.

b. Age Profile

Data in Table 9 shows the age profile in the Resident Market Area compared to other jurisdictions. An estimated 26 percent of the population is between the ages of 18 and 24, reflecting the local student population. Almost 50 percent of the Downtown population is between the ages of 18 to 24 years old. The population in the Secondary Market Area is similarly skewed by towards population over 55 years old, reflecting the “graying” of the regional population. Compared to the resident market segments, Downtown and the City contain a higher proportion of a college age students.

Table 9
Age Distribution, 2015
Resident Market Area and Comparison Areas

Market Area	Median Age	0 to 17	18 to 24	25 to 34	35 to 54	55+
Primary Market Area	28.9	19.6%	26.1%	10.0%	17.9%	26.4%
Secondary Market Area	46.4	19.1%	7.7%	10.6%	25.6%	37.0%
Total Resident Market Area	**38.9**	**19.3%**	**15.6%**	**10.4%**	**22.3%**	**32.5%**
Comparison Areas						
Downtown Study Area	24.2	9.9%	47.1%	13.0%	14.5%	15.5%
City of Oneonta	23.6	19.9%	38.4%	9.6%	13.0%	19.1%
Otsego County Less Oneonta	NC	18.8%	7.8%	10.1%	25.7%	37.5%
Otsego County	41.8	19.1%	14.6%	10.0%	22.9%	33.5%
NY State	38.7	21.4%	9.8%	14.2%	26.4%	28.1%
United States	37.9	23.0%	9.8%	13.6%	26.0%	27.6%

NC = Not Calculated.
Source: ESRI and ConsultEcon, Inc.

c. Educational Attainment

Data in Table 10 shows the educational attainment of the population over 25 in the Resident Market Area and other comparison areas in 2013, which was the most recent year available. Overall, the Primary Market Area population over 25 has a higher share of the population with Bachelor's and Advanced degrees than the population over 25 in the Secondary Market Area. The secondary market had a slightly lower education level than New York and United States as a whole.

Table 10
Educational Attainment of Population over 25,
2013 Estimate Resident Market Area and Comparison Areas

Market Area	No Schooling Completed	Some Primary Education	High School Diploma or GED	Some Higher Education	Bachelor's Degree	Advanced Degree	Total
Primary Market Area	0.6%	8.7%	28.8%	27.5%	19.6%	14.9%	100.0%
Secondary Market Area	1.1%	10.1%	38.7%	29.2%	12.5%	8.5%	100.0%
Total Resident Market Area	**0.9%**	**9.6%**	**35.1%**	**28.6%**	**15.0%**	**10.8%**	**100.0%**
Comparison Areas							
Downtown Study Area	0.5%	7.5%	31.9%	29.1%	20.4%	10.6%	100.0%
City of Oneonta	0.3%	8.2%	22.5%	26.0%	25.5%	17.6%	100.0%
Otsego County Less Oneonta	0.9%	9.8%	36.1%	29.1%	13.4%	10.7%	100.0%
Otsego County	0.8%	9.5%	34.2%	28.7%	15.2%	11.7%	100.0%
NY State	1.7%	13.1%	27.1%	24.8%	18.9%	14.3%	100.0%
United States	1.3%	12.6%	28.1%	29.1%	18.0%	10.8%	100.0%

Source: U.S. Census Bureau, American Community Survey Population Summary, 2009-2013 Estimate; ConsultEcon, Inc.

d. Household Characteristics

Data in Table 11 shows household characteristics in the Resident Market Area in 2015. There were approximately 22,000 households in the Resident Market Area in 2015, with an average household size of 2.28 persons. This average household size is low compared to the State and U.S. as a whole, reflecting of the low proportion (60%) of family households, particularly in the Primary Market Area which contains the bulk of the student population.

Table 11
Household Characteristics, 2015
Resident Market Area and Comparison Areas

Market Area	Total Households	Family Households	Families as a Percent of Households	Average Household Size
Primary Market Area	8,468	4,419	52.2%	2.20
Secondary Market Area	13,505	8,735	64.7%	2.33
Total Resident Market Area	**21,973**	**13,154**	**59.9%**	**2.28**
Comparison Areas				
Downtown Study Area	415	107	25.8%	1.98
City of Oneonta	4,260	1,782	41.8%	2.15
Otsego County Less Oneonta	*20,542*	*13,300*	*64.7%*	*2.32*
Otsego County	24,802	15,082	60.8%	2.29
NY State	7,476,368	4,723,347	63.2%	2.56
United States	120,746,349	79,691,683	66.0%	2.57

Source: ESRI and ConsultEcon, Inc.

a. Household Income

Data in Table 12 shows household income distribution in the Resident Market Area in 2015. Due to the large number of students in the Primary Market Area, household incomes are lower than the incomes in the State and U.S. This is particularly the case among households in the City of Oneonta and Downtown. Almost 64 percent of households have income of less than $25,000. Data in Table 13 show total household income in 2015 and projections for 2020.

Table 12
Household Income Distribution, 2015
Resident Market Area and Comparison Areas

Market Area	Median Household Income	Less than $25,000	$25,000 to $49,999	$50,000 to $74,999	$75,000 to $99,999	$100,000 +
Primary Market Area	$39,518	32.9%	26.6%	15.5%	9.8%	15.2%
Secondary Market Area	$44,477	25.1%	29.9%	20.4%	11.6%	13.0%
Total Resident Market Area		**28.1%**	**28.6%**	**18.5%**	**10.9%**	**13.8%**
Comparison Areas						
Downtown Study Area	$17,576	64.0%	24.2%	4.1%	4.3%	3.4%
City of Oneonta	$32,743	41.6%	26.5%	11.7%	8.8%	11.4%
Otsego County Less Oneonta	NC	*22.7%*	*29.2%*	*20.7%*	*10.9%*	*16.5%*
Otsego County	$44,631	25.9%	28.7%	19.2%	10.5%	15.6%
NY State	$58,048	22.2%	21.1%	16.4%	12.0%	28.2%
United States	$53,217	23.1%	23.8%	17.6%	12.5%	23.1%

NC = Not Calculated.
Source: ESRI and ConsultEcon, Inc.

Table 13
Total Household Income, 2015, 2020
Resident Market Area and Comparison Areas

	2015			2020			
Market Area	**Households**	**Average Household Income**	**Total Household Income**	**Households**	**Average Household Income**	**Total Household Income**	**Percent Change in Total Household Income, 2015 to 2020**
Primary Market Area	8,468	$58,534	$495,665,912	8,426	$66,460	$559,991,960	13.0%
Secondary Market Area	13,505	$58,527	$790,407,135	13,596	$65,620	$892,169,520	12.9%
Total Resident Market Area	**21,973**	**$58,530**	**$1,286,073,047**	**22,022**		**$1,452,161,480**	12.9%
Comparison Areas							
Downtown Study Area	415	$27,377	$11,361,455	410	$30,751	$12,607,910	11.0%
City of Oneonta	4,260	$48,473	$206,494,980	4,180	$54,972	$229,782,960	11.3%
Otsego County Less Oneonta	20,542	$65,055	$1,336,363,034	20,678	$73,426	$1,518,306,174	13.6%
Otsego County	24,802	$62,207	$1,542,858,014	24,858	$70,323	$1,748,089,134	13.3%
NY State	7,476,368	$84,542	$632,067,103,456	7,650,474	$96,198	$735,960,297,852	16.4%
United States	120,746,349	$74,699	$9,019,631,523,951	125,477,562	$84,910	$10,654,299,789,420	18.1%

NC = Not Calculated.
Source: ESRI and ConsultEcon, Inc.

b. Selected Consumer Expenditure Category

Data in Table 14 shows consumer spending capacity by product or service categories. Residents spend both inside and outside of Oneonta and the defined Resident Market Area.

Table 14
Estimated Household Expenditures on Select Goods and Services
(Sales Potential of Area Households), 2015
Resident Market Area and Comparison Areas

	Primary Market Area	Secondary Market Area	Total Resident Market Area
Food (at home)	$35,266,570	$57,426,213	$92,692,783
Gasoline and Motor Oil	24,190,225	40,211,867	64,402,092
Entertainment & Recreation	22,037,837	36,328,365	58,366,202
Food (dining out)	21,676,041	33,472,184	55,148,225
Apparel & Services	15,162,841	23,179,023	38,341,864
Vehicle Maintenance and Repair	7,496,775	12,103,649	19,600,424
Household Furnishings and Equipment	7,194,457	11,468,995	18,663,452
Health	4,910,020	8,830,114	13,740,134
Housekeeping Supplies	4,849,551	8,223,010	13,072,561
Smoking Products	3,522,349	6,012,686	9,535,035
Alcoholic Beverages	3,684,579	5,299,854	8,984,433
Nonalcoholic Beverages at Home	3,413,134	5,558,346	8,971,480
Personal Care Products	3,100,184	4,947,380	8,047,564
Household Lawn and Garden	2,881,787	5,341,119	8,222,906
Home Maintenance and Remodeling Materials	1,978,004	4,070,136	6,048,140
Computers	1,745,958	2,644,123	4,390,081
School Books and Supplies	1,265,979	1,774,641	3,040,620
Total	**$164,376,291**	**$266,891,705**	**$431,267,996**

Source: ESRI; Bureau of Labor Statistics; ConsultEcon, Inc.

c. Consumer Expenditures by Store Category

Data in Table 15 shows total Market Area consumer spending capacity in retail trade and restaurants by NAICS category or store type. This represents the amount that residents could potentially spend across these consumer spending categories. Again, residents spend both inside and outside of Oneonta and the defined Resident Market Area.

Table 15
Household Expenditures by NAICS Industry Description,
2015 Resident Market Area and Comparison Areas

NAICS Industry	Primary Market Area Spending Capacity	Secondary Market Area Spending Capacity	Total Resident Market Area Spending Capacity
Motor Vehicle & Parts Dealers	$55,397,638	$93,627,052	$149,024,690
Food Services & Drinking Places	24,798,327	79,079,445	103,877,772
Food & Beverage Stores	48,472,244	38,204,419	86,676,663
General Merchandise Stores	28,795,248	46,124,262	74,919,510
Health & Personal Care Stores	19,806,294	33,704,347	53,510,641
Clothing & Clothing Accessories Stores	17,691,686	27,112,449	44,804,135
Electronics & Appliance Stores	17,330,418	27,076,412	44,406,830
Gasoline Stations	16,017,155	26,781,956	42,799,111
Miscellaneous Store Retailers	12,224,226	21,284,619	33,508,845
Bldg Materials, Garden Equip. & Supply Stores	10,739,096	19,066,596	29,805,692
Furniture & Home Furnishings Stores	8,201,623	13,070,390	21,272,013
Sporting Goods, Hobby, Book & Music Stores	7,230,001	11,949,278	19,179,279
Total	**$266,703,956**	**$437,081,225**	**$703,785,181**

Note: Consumer spending capacity in restaurant and retail categories only. Does not include spending on nonstore retailers, transportation, lodging, entertainment and recreation, and personal services. The location of spending may be in Downtown Oneonta, elsewhere in Resident Market Area, or outside of the Resident Market Area.

Source: ESRI; Bureau of Labor Statistics; ConsultEcon, Inc.

<u>Supply/Sales Gap</u>

The sales gap, also known as the supply gap, is the difference between the total consumer spending capacity in a market area and the total estimated retail sales of stores located in that market area. Data in Table 16 and Table 17 show the estimated sales gap in the Primary Market Area and in the total Resident Market Area, respectively. In the Primary Market Area, there is leakage of $4.9 million in Clothing and Clothing Accessories. In the total Resident Market Area, there is a leakage of:

- $29.9 million in Clothing and Clothing Accessories,
- $24.1 million in Food Services and Drinking Places,
- $4.6 million in Furniture and Home Furnishings, and
- $1.7 million in Electronics and Appliance Stores

Table 16
Retail Trade and Food Services Supply Gap in Primary Market Area, 2015

	Total Sales Potential / Demand	Estimated Sales / Supply	Leakage / (Surplus)
Motor Vehicle & Parts Dealers	$55,397,638	$161,274,609	($105,876,971)
Food Services & Drinking Places	24,798,327	52,274,219	(27,475,892)
Food & Beverage Stores	48,472,244	87,880,670	(39,408,426)
General Merchandise Stores	28,795,248	169,762,372	(140,967,124)
Health & Personal Care Stores	19,806,294	51,513,239	(31,706,945)
Clothing & Clothing Accessories Stores	17,691,686	12,808,114	4,883,572
Electronics & Appliance Stores	17,330,418	26,974,001	(9,643,583)
Gasoline Stations	16,017,155	42,959,446	(26,942,291)
Miscellaneous Store Retailers	12,224,226	32,627,387	(20,403,161)
Bldg Materials, Garden Equip. & Supply Stores	10,739,096	37,450,205	(26,711,109)
Furniture & Home Furnishings Stores	8,201,623	13,935,587	(5,733,964)
Sporting Goods, Hobby, Book & Music Stores	7,230,001	19,276,878	(12,046,877)
Total	**$266,703,956**	**$708,736,727**	**($442,032,771)**

Note: Consumer expenditures in restaurant and retail categories only. Does not include spending on nonstore (e.g. internet) retailers, transportation, lodging, entertainment and recreation, and personal services. The location of spending may be in Downtown Oneonta, elsewhere in Resident Market Area, or outside of the Resident Market Area.
Source: ESRI; Bureau of Labor Statistics; ConsultEcon, Inc.

Table 17
Retail Trade and Food Services Supply Gap in the Resident Market Area

NAICS Industry	Total Sales Potential / Demand	Estimated Sales / Supply	Leakage / (Surplus)
Motor Vehicle & Parts Dealers	$149,024,690	$238,864,750	($89,840,060)
Food Services & Drinking Places	103,877,772	79,811,442	24,066,330
Food & Beverage Stores	86,676,663	166,351,436	(79,674,773)
General Merchandise Stores	74,919,510	198,621,146	(123,701,636)
Health & Personal Care Stores	53,510,641	63,885,275	(10,374,634)
Clothing & Clothing Accessories Stores	44,804,135	14,870,970	29,933,165
Electronics & Appliance Stores	44,406,830	42,711,504	1,695,326
Gasoline Stations	42,799,111	86,168,125	(43,369,014)
Miscellaneous Store Retailers	33,508,845	51,136,840	(17,627,995)
Bldg Materials, Garden Equip. & Supply Stores	29,805,692	58,050,710	(28,245,018)
Furniture & Home Furnishings Stores	21,272,013	16,667,154	4,604,859
Sporting Goods, Hobby, Book & Music Stores	19,179,279	26,819,781	(7,640,502)
Total	**$703,785,181**	**$1,043,959,133**	**($340,173,952)**

Note: Consumer expenditures in restaurant and retail categories only. Does not include spending on nonstore (e.g. internet) retailers, transportation, lodging, entertainment and recreation, and personal services. The location of spending may be in Downtown Oneonta, elsewhere in Resident Market Area, or outside of the Resident Market Area.
Source: ESRI; Bureau of Labor Statistics; ConsultEcon, Inc.

Supportable Real Estate
Data in Table 18 shows an estimated total supportable real estate in square feet based on the sales leakage identified in prior two tables. In Primary Market Area, there is sales gap leakage that would support 15,000 square feet of space in Clothing and Clothing Accessories. In the total Resident Market Area, there is sales gap leakage that would support the following amount of retail space:

- 110,000 square feet of Clothing and Clothing Accessories
- 46,000 square feet of Food Services and Drinking Places
- 18,000 square feet of Furniture and Home Furnishings Stores
- 5,000 square feet of Electronics and Appliance Stores

Table 18
Supportable Real Estate in Square Footage based on Sales/Supply Gap in the Primary Market Area and in the Total Resident Market Area

NAICS Industry	Benchmark Retail Sales per Square Foot (SF) 1/	Primary Market Area: Sales Leakage	Primary Market Area: Supportable Real Estate in SF	Total Resident Market Area: Sales Leakage	Total Resident Market Area: Supportable Real Estate in SF
Food Services & Drinking Places	$523			$24,066,330	46,050
Clothing & Clothing Accessories Stores	$317	$4,883,572	15,384	$29,933,165	94,296
Electronics & Appliance Stores	$372			$1,695,326	4,556
Furniture & Home Furnishings Stores	$259			$4,604,859	17,760
Total		**$4,883,572**	**15,384**	**$60,299,680**	**162,662**

1/ Midpoint between the 2007 benchmark median sales per SF by store type for Community Shopping Centers in U.S. and the median sales per SF by store type for Regional Shopping Centers in U.S. 2007 benchmarks adjusted to October 2015 based on various Consumer Price Index expenditure components, including Food Away from Home, Apparel, Recreation and Household Furnishings and Operations.

Source: Dollars & Cents of Shopping Centers, The Score 2008, ULI and ICSC; ESRI; Bureau of Labor Statistics; ConsultEcon, Inc.

Tourist Market

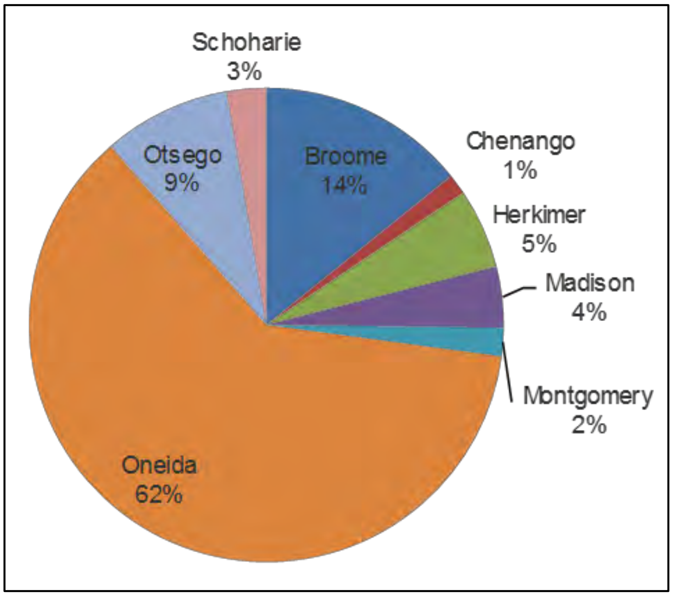
Tourism is an important part of the economy in downtown Oneonta. Downtown's tourism assets include accommodations, arts and cultural attractions, downtown events, its diverse restaurant and shopping base. Key market segments include:

- Regional leisure travelers
  - Baseball camp attendees and their families
  - Cultural travelers
  - Culinary travelers
- Visiting Friends and Relatives (VFRs)
- Regional business travelers
- Pass through travelers

State and Regional Tourism Impacts

Tourism is an important part of the regional economy. New York State is divided into 11 economic regions. New York City is the largest single tourism region accounting for 66 percent of statewide visitor spending of $62.5 billion, as shown by data in Figure 7. Central New York, where Oneonta is located, accounts for 3 percent of state visitor spend. Tourism in Central New York is a $2 billion industry, supporting 35,892 jobs. Otsego County represents 9 percent of the region's tourism sales with more than $175.6 million in traveler spending in 2014, a 4.8 percent increase over 2013 tourism sales.

Figure 7
Tourism Sales by County in Central New York Region

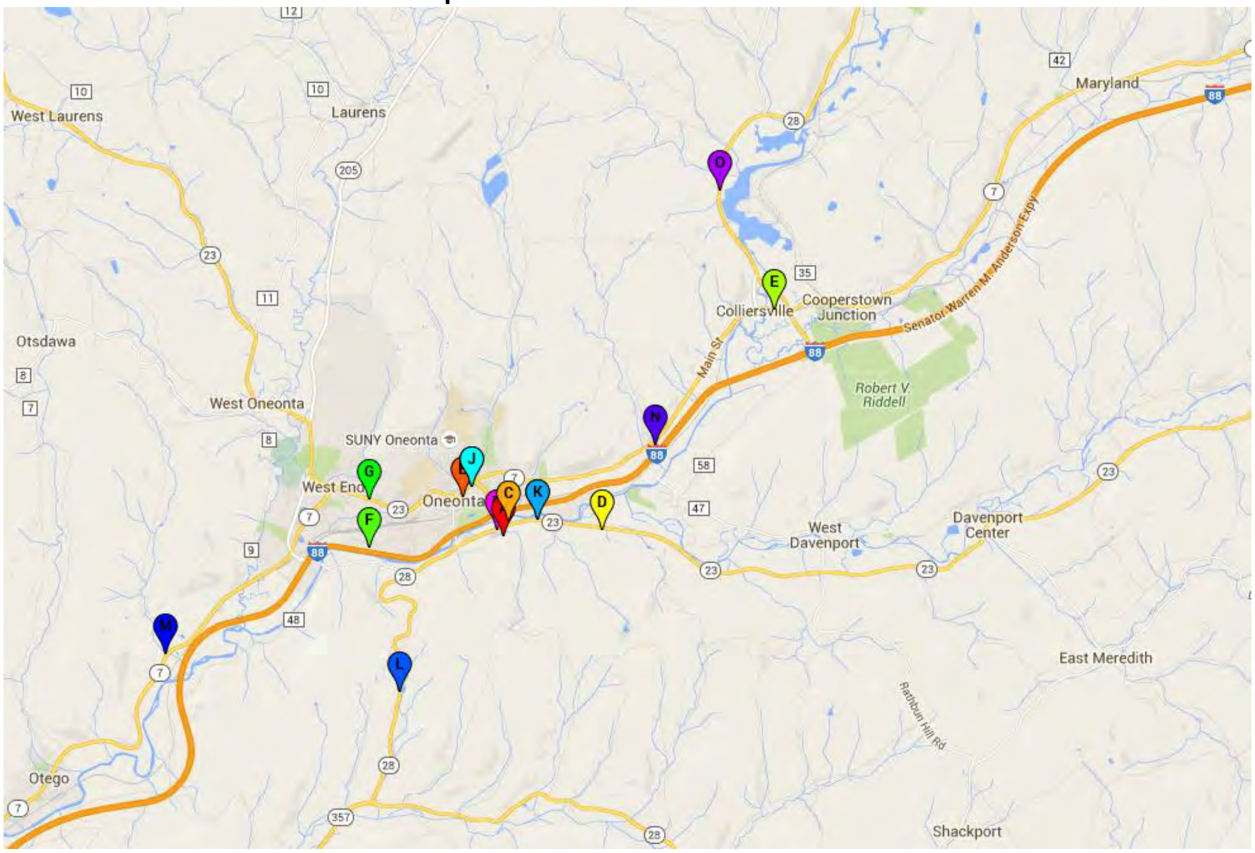


Source: Tourism Economics.

Hotels/Motels
Based on a scan of hotel and motel properties, there are a total of 1,391 hotel and motel rooms in Otsego County. Over half (704) of the hotel and motel rooms in Otsego County are located in Oneonta and Colliersville, proximate to the interstate. Figure 8 shows the location of nearby hotels and motels in Oneonta. The remaining rooms in Otsego County are located in Cooperstown, Richland Springs and surrounding Otsego and Canadarago Lakes. (The inventory of hotels and motel properties appears in Appendix C.) There are two hotels in downtown Oneonta. The other hotels are less than a 5 minute drive from downtown.

According to Visit Cooperstown, the destination marketing organization for all of Otsego County, hotel occupancy rates run highest in summer due to leisure travel in area, with average occupancy between 80 and 85 percent. The fall season is also strong among leisure travelers and the college family market. Unlike other New York State destinations, Otsego County does not have ski resorts or other attractions that drive winter activity. Due to the lack of winter activities, many of the hotels and motels have a drop-off in occupancy during the winter. Hotels and motels in Cooperstown, in particular, operate seasonally for that reason.

Figure 8
Map of Hotels and Motels in Oneonta



Source: ConsultEcon, Inc.

<u>Seasonal Housing</u>

Between 2009 and 2014, there was an increase in the number of seasonal housing units in Otsego County. There were 4,078 housing units in Otsego County in 2014, compared to 3,008 in 2009.[9] These units are second homes of owners that primarily live elsewhere, or are rented out on weekly or seasonal basis to vacationers. An important market driving the rental of homes and apartments on a weekly basis is the weeklong baseball camps that are offered in Cooperstown and Oneonta. Youth baseball teams, coaches and families from throughout the U.S. descend on a number of baseball field complexes, including Cooperstown Dreams Park, Cooperstown All Star Village, and Cooperstown Baseball World. Data in Table 19 estimate the annual visitation of this tourist market segment, including players, coaches and families that join the week's activities. As key destination and provider of tourist services in the region, many of these visitors will stop in the downtown area. Providing the tourist segments with information about what to do and where to go in the area is important role that Oneonta's downtown can serve.

[9] Number of vacant units for seasonal, recreational or occasional use from the U.S. Census Bureau's 2005-2009 and 2010-2014 American Community Survey 5 year estimates.

Table 19
Estimates of Annual Baseball Camp Visitation

Park	Number of Weeks	Number of Teams	Teams per Season
Cooperstown Dream Park	13	104	1,352
Cooperstown Allstar Village	12	20	240
Cooperstown Baseball World	5	12	60
Total Teams			**1,652**
Teams			**Persons**
Players			15
Coaches			3
Family Members	3	per player	45
Estimated Persons per Team			**63**
Estimated Total Baseball Camp Visitation			**104,076**

Source: Facility websites and ConsultEcon, Inc.

Local and Regional Attractions

Data in Table 20 shows the local attractions within Oneonta and the region. Downtown Oneonta is one of the primary arts, cultural and entertainment destinations in the county, with a particular concentration of live arts facilities, including the Oneonta Theater, the Foothills Performing Arts Center, and the B-Side Ballroom.

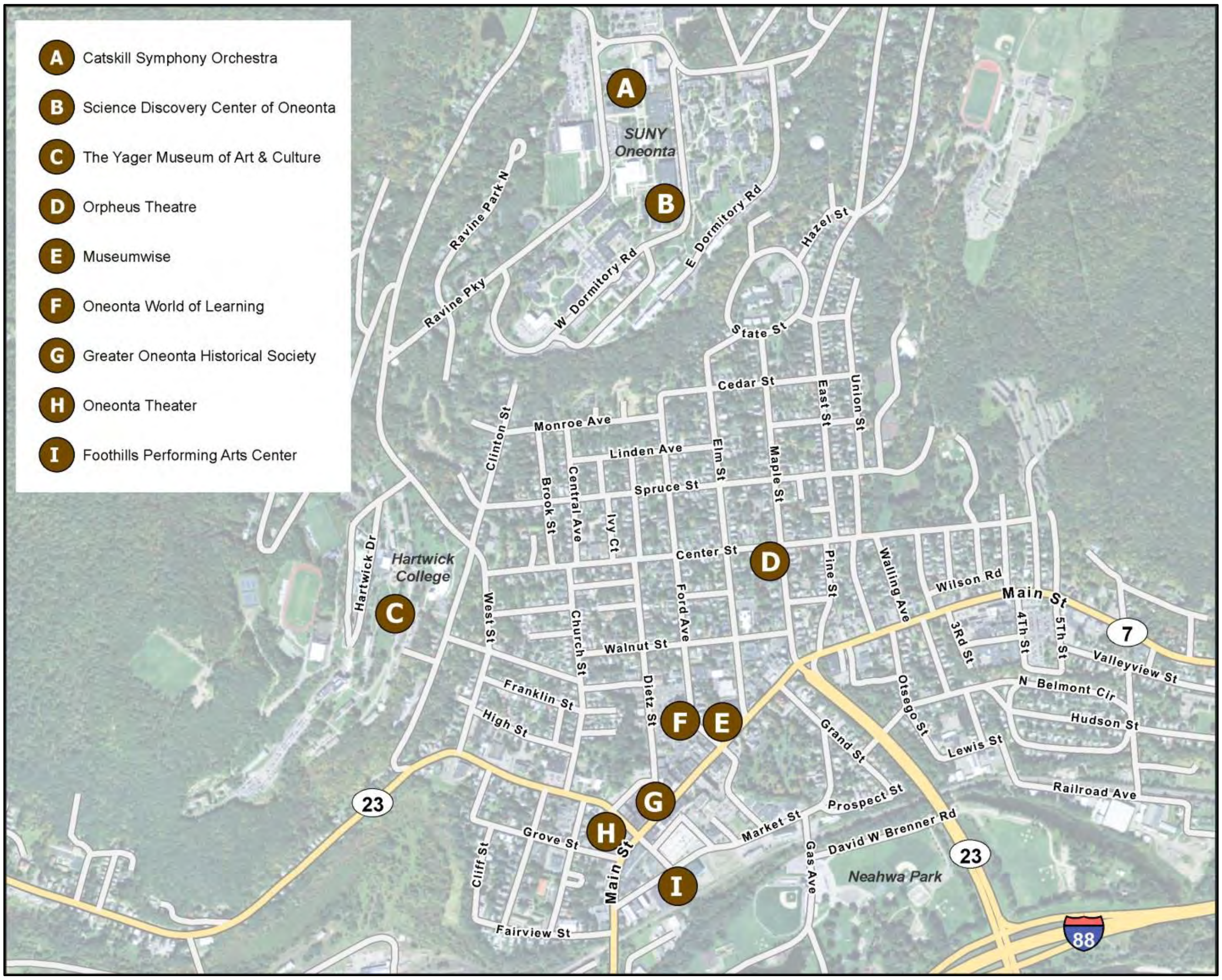
Table 20
Selected Oneonta and Otsego County Attractions

Attraction	Attendance/Capacity	Pricing	Description
Oneonta			
Science Discovery Center of Oneonta, State University New York College, Bugbee Hall, 3rd Fl., Oneonta, NY, 13820-4015	Attendance 5,720	Free/donations accepted	Science museum with concentration on physics and physical science; interactive science exhibits.
Oneonta World of Learning – OWL, 277 Main St., Oneonta, NY, 13820	Attendance NA	$5.00/child	Children's museum with hands-on exhibits.
The Yager Museum of Art & Culture, One Hartwick Dr., West St., Oneonta, NY, 13820-4000	Attendance NA	Free/donations accepted	Upper Susquehanna Indian artifacts, Southwest basketry and pottery; Furman collection of Mexican, Central American and South American artifacts; Ecuadorian and Peruvian artifacts; Mexican masks; Pre-Columbian art. Renaissance, baroque and American 19th century paintings, prints and sculpture; American Indians. Russian icons.
Greater Oneonta Historical Society, 183 Main Street, Oneonta, NY 13820	Attendance 5-6,000	Free/donations accepted: have membership program $25/yr.	5,000 items consist of farm equipment, clothing, photographs, postcards, portraits, ephemera, and other historical regalia which pertain to the Upper Susquehanna region.
Oneonta Theater, 47 Chestnut Street, Oneonta, NY 13820	Capacity Upstairs – 200 Downstairs – 700	Depends upon event or show	Originally established in 1897 as a state-of-the-art Vaudeville playhouse, the Oneonta Theatre reopened in 2010 as a restored venue for national and local touring musicians, theatrical productions, films and more.

Attraction	Attendance/Capacity	Pricing	Description
Catskill Symphony Orchestra, 108 Ravine Parkway, Oneonta, NY 13820	Attendance NA	Generally $30-$40 for concert – prices vary for other events	The CSO selects repertoire from the five major musical periods – Baroque, Classical, Romantic, Modern and Contemporary – with nearly equal representation.
Goodrich Theater / Hamblin Theater SUNY-Oneonta	Capacity Goodrich: 487 Hamblin: Approximately 200	Varies, depending on the performance.	Home of SUNY Oneonta theater program, used by outside groups such as Orpheus Theater.
Orpheus Theater, 31 Maple Street, Oneonta, NY 13820	Attendance NA	Depends on show: general range $10-$20/adult	Orpheus Theatre utilizes local residents for all areas of production including: performers, directors, choreographers, costume designers, lighting and set designers, and musical directors. In addition, they offer workshops for children and teens.
Foothills Performing Arts & Civic Center, 24 Market Street, Oneonta, NY 13820	Capacity Main theater accommodates up to 775 seated.	Admission pricing depends on event or show	In addition to being a center for the performing arts and educational outreach in the tri-county area, Foothills also offers civic space for trade shows and exhibitions.
Brooks House of BBQ	Capacity NA	Restaurant pricing	BBQ restaurant with largest indoor charcoal barbecue pit in the east.
Cooperstown / Otsego County			
National Baseball Hall of Fame & Museum, 25 Main Street, Cooperstown, NY, 13326	300-335,000 (est.)	$23.00 adult $12.00 child 7-12, $15.00 senior 65+	Sports museum, with Plaques of members of Baseball Hall of Fame, autographed baseballs, bats, trophies, books, pictures, paintings, cigarette and gum cards, uniforms, cartoons, history time line, and video tapes of World Series and All-Star Games
Fly Creek Cider Mill & Orchard	125,000		Dairy farm with seasonal agri-tourism.
Ommegang Brewery	Est. 85,000	Free Tours Tastings $5.00	Belgian-style brewery, opened in 1997.
The Farmer's Museum, Inc., 5775 State Hwy. 80, Cooperstown, NY, 13326	50-60,000 (est.)	$12.00 adult and children 13+ $10.50 senior 65+ $6.00 child 7-12	Village Museum: housed in early 19th-century Village including 29 buildings
New York State Historical Association-Fenimore Art Museum, 5798 St. Hwy. 80, Cooperstown, NY, 13326	35-41,700 (est.)	$12.00 adult and child 13+ $10.50 senior 65+ Free to child 12 and under	Art museum and historical association with Academic and folk art, costumes, sculpture, graphics, history, decorative arts, manuscripts and American Indian Art.
Hyde Hall, Inc., 267 Glimmerglass State Park Rd., Cooperstown, NY, 13326	5,000	$12 adult $10 child 6–17, seniors 62+	Historic House museum with family artifacts dating from 1820.
Cooperstown Heroes of Baseball Wax Museum, 99 Main St., Cooperstown, NY, 13326	NA	$9.95 adult $7.95 child 4-12 and senior 65+	Over 40 life-sized wax figures; videos.
The Smithy, 55 Pioneer St., Cooperstown, NY, 13326	NA	Free to visit: charge for classes and certain events	Art gallery with classes, educational programs, and workshops.
The Glimmerglass Festival, 7300 State Highway 80, Cooperstown, NY 13326	NA	Adult single tickets: $26-$144 depending on seating/level 12 and under: $10-$25	Internationally acclaimed summer opera festival presents operas in a setting overlooking Otsego Lake. Previews, meet-the-performers, tours, picnic meals on spacious lawns.

Source: Cooperstown/Otsego County website, facilities listed, AAM Official Museum Directory, ConsultEcon, Inc.

Figure 9
Map of Oneonta Museums and Cultural Attractions



Source: Google Maps, ESRI, and The LA Group

<u>Summary</u>
The Resident Market Area for downtown Oneonta is defined as a 30 minute drive to Oneonta. The market area population is projected to be stable at 55,000 persons between 2015 and 2020. An estimated 26 percent of the population is between the ages of 18 and 24, reflecting the local student population. The population in the Secondary Market Area is similarly skewed by the population over 55 years old, reflecting the “graying” of the regional population. The population in the Primary Market Area contains more persons over 25 with bachelors and advanced degrees than in the Secondary Market Area.

Due to the large number of students in the Primary Market Area, households contain fewer persons and median household incomes are lower than the households in the State and U.S. There were approximately 22,000 households in 2015, with an average household size of 2.28 persons. This pattern of low household incomes and small household sizes is particularly evident among households in the City of Oneonta and Downtown.

Total household income in the Resident Market Area is estimated at $1.3 billion in 2015. These resident households are estimated to generate approximately $703 million in retail and restaurant spending. In the total Resident Market Area, there is an estimated sales leakage that would support the addition of 178,000 square feet of retail space, distributed as follows:

- 110,000 square feet of Clothing and Clothing Accessories
- 46,000 square feet of Food Services and Drinking Places
- 18,000 square feet of Furniture and Home Furnishings Stores
- 5,000 square feet of Electronics and Appliance Stores

Tourism is an important part of the regional economy and in Oneonta. Otsego County's tourism sales were more than $175.6 million in 2014, an increase from 2013. Over half of the hotel and motel rooms in Otsego County are located in Oneonta and Colliersville proximate to the interstate. Downtown Oneonta has two hotels. According to Visit Cooperstown, the destination marketing organizations for all of Otsego County, hotel occupancy rates run highest in summer due to leisure travel in area, with average occupancy between 80 and 85 percent. The fall season is also strong among leisure travelers and the college family market.

Between 2009 and 2014, there was a large increase in the number of seasonal housing units in Otsego County. There were 4,078 housing units in Otsego County in 2014, compared to 3,008 in 2009.[10] These units are second homes of owners that primarily live elsewhere, or are rented out on weekly or seasonal basis to vacationers. An important market driving the rental of homes and apartments on a weekly basis is the weeklong baseball camps that are offered in Cooperstown and Oneonta. Downtown Oneonta is one of the primary arts, cultural and entertainment destinations in the county, with a particular concentration of live arts facilities, including the Oneonta Theater, the Foothills Performing Arts Center, and the B-Side Ballroom.

[10] Number of vacant units for seasonal, recreational or occasional use from the U.S. Census Bureau's 2005-2009 and 2010-2014 American Community Survey 5 year estimates.

V. HOUSING ANALYSIS

A. Project Description

The approach to the housing analysis begins with establishing the demographic and housing inventory characteristics of the City. The demographic characteristics are comprised of population, population age cohorts, household income, the cost of housing (rent or mortgage, real property taxes, and energy for heating/cooling), and the levels and availability of housing by type (single-family detached, townhouse, apartment, owner or renter, and apartments). Based upon the assessment of these demographic characteristics in the City, a housing needs assessment (HNA) will be conducted to quantify in "real world terms" the demand for various housing types and at what price point buyers and renters can afford.

The HNA describes how changing demographic characteristics and lifestyles affect housing needs. To supplement the demographic assessment described above, interviews with key contacts, practitioners, and citizens were also performed so a complete thorough understanding of the housing needs can be defined. The analysis of these findings in consideration of the housing standards and goals within the region will identify points of non-conformity that needs to be addressed through implementation of targeted strategies to address the identified needs. Therefore, the HNA is broken down into five sections:

- ***Project Foundation –*** This section provides the background information and methodology for the housing analysis.
- ***Demographic Profile –*** This section analyzes the 2010 census data and other data available in the 2014 American Community Survey.
- ***Housing Characteristics –*** This section presents characteristics that have an impact on housing such as population, household size, employment, industry growth, income, vacancy rates, poverty, and affordability in terms of Debt to Income Ratio.
- ***Housing Analysis –*** This section presents characteristics further association with the housing delivery system. It address geographic differences in permanent and seasonal housing, rental unit rates and availability, owner occupied and renter occupied vacancy rates, building permits, construction costs, and the operation of housing authorities. Housing demand examines the expected future population of the City and the existing housing stock to provide insight on the future availability of housing.
- ***Housing Goals and Recommended Strategies –*** Present detailed recommendations for the market area. Some of the recommendations presented are relevant in multiple market areas as they share a number of gaps in the housing delivery system. The recommendations are targeted towards providing an affordable base of housing opportunities, encouraging rehabilitation of the existing housing stock, providing additional market rate and subsidized rental opportunities, and increased collaboration between housing authorities.

B. Project Foundation

The primary purpose of the HNA is to quantify needs and identify achievable community goals. In order to accomplish this goal, research was conducted of federal, state, and local data resources. General demographic data was collected from the US Census Bureau, NYS Department of Labor, and the US Bureau of Labor Statistics. Specific data sets collected include population, workforce, and employment by industry, occupancy rates, poverty, household income, and family income.

Background and information resources for housing also include the following reports:

- City of Oneonta Comprehensive Plan, 2007
- Otsego County Fact Book, 2008
- Integrated Housing Needs and Opportunities Study, Otsego County, 2009
- An Atlas of Land Use and Housing Condition for Otsego County, New York, 2011
- Comparative Analysis of Land Use and Residential Housing in Otsego County, 2011
- Otsego County Profile, 2013
- City of Oneonta Comprehensive Housing Plan, 2013

In addition, the analysis identified the local opinions of key contacts, practitioners, and citizens through a series of interviews consisting of pertinent questions relating to housing needs in the region. Topics discussed with the various participants include: new residential development projects, construction costs, availability and affordability of housing, local housing market trends, housing stock and condition, impacts of housing on economic development, lending trends, and current housing strategies.

C. Demographic Profile

Overview

Oneonta is the principal city in the Oneonta Micropolitan Statistical Area. For the purpose of collecting data, Oneonta is part of a "micro area" meaning that it contains one urban cluster of at least 10,000 people but less than 50,000 people.

Population

Cornell University's College of Human Ecology, Program of Applied Demographics has developed population projections by county through 2035 across NYS. These population projections take into consideration birth and death rates, and in-migration and out-migration. Population trends for the city, county and state are indicated in Table 21. The population of Oneonta grew only three out of the last seven decades. Between 1980 and 2000 there was a period of significant decline in the population. The population declined a total of 2,738 people, or 17% of the 1970 population. The population rebounded during the period from 2000-2010, but remained lower than Oneonta's peak population in 1970. Much of the population increases in the 1950s and 1960s can be correlated with the significant growth in facilities, faculty members and students at SUNY Oneonta. With a population growth rate of 4.6% the City of Oneonta placed third among the municipalities of Otsego County that experienced an increase in population from 2000 to 2010 (12 of the towns in Otsego County lost population while 12 towns gained population). However, recent estimates of population indicate a slight decrease (-0.5%) from 2010 through 2014.

Table 21
Population Change 1940-2010

Year	*City of Oneonta*			*Otsego County*			*New York State*		
	Number*	Change #	Change %	Number	Change #	Change %	Number	Change #	Change %
1940	11,731	-	-	46,082	-	-	13,479,142	-	-
1950	13,564	1,833	15.6	50,763	4,681	10.2	14,830,192	1,351,050	10.0
1960	13,412	-152	-1.1	51,942	1,179	2.3	16,782,304	1,952,112	13.2
1970	16,030	2,618	19.5	56,181	4,408	8.5	18,236,967	1,454,663	8.7
1980	14,933	-1,097	-6.8	59,075	2,725	4.8	17,558,072	-678,895	-3.7
1990	13,954	-979	-6.6	60,517	1,442	2.4	17,990,455	432,383	2.5
2000	13,292	-662	-4.7	61,676	1,159	1.9	18,976,457	986,002	5.5
2010	13,901	609	4.6	62,259	583	0.9	19,378,102	401,645	2.1

*Number of persons includes college students *Source: US Census*

Between 1940 and 2010, the overall population of the city of Oneonta increased by 18.5% or 2,170 people. Over the same 70 year period, the population of Otsego County grew by 35% or 16,177 people. Both peaked in 1970 and continued to realize slow growth through 2010. New York State's population grew by nearly 6 million people or 44% over the same time frame.

Table 22 indicates population projections through 2040. Population trends are available through 2014 for the City and indicated a 0.5% drop in overall population. It dropped to 1980 levels for the County, and remains about level for the State over the next 25 years.

Table 22
Population Projections

Year	*City of Oneonta*			*Oneonta County*			*New York State*		
	Number*	Change #	Change %	Number	Change #	Change %	Number	Change #	Change %
2010	13,901	-	-	62,259	-	-	19,378,102	-	-
2014	13,838	-63	-0.5	61,128	-1,131	-1.8	19,746,227	368,125	1.9
2020	NA	NA	NA	62,094	-165	-0.3	19,697,021	318,919	1.6
2030	NA	NA	NA	61,343	-751	-1.2	19,794,733	97,712	0.50
2040	NA	NA	NA	59,637	-1,706	-2.8	19,623,506	-171,227	-0.87

*Number of persons includes college students
Source: 2010 actual population from US Census; 2014 estimates and 2020-2040 projected populations provided by Cornell Program on Applied Demographics. 2020-2040 projections are not available at the city level.

Table 23
Demographic Characteristics

	City of Oneonta	***Otsego County***	***New York State***
Family and Housing			
Number of Housing Units*	4,774	30,777	8,108,103
Number of Households	4,372	24,078	7,234,743
Persons Per Household	2.23	2.36	2.61
Median monthly owner mortgage costs	$1,251	$1,245	$2,040
Median monthly owner costs with no mortgage	$462	$474	$704
Median Gross Rent	$850	$775	$1,088
Owner-Occupied Housing Unit Rate	43.2	73.3%	54.2%
Median Value of Owner-Occupied Housing Units	$134,800	$137,900	$288,200
Homeownership Rate (2008-2013)	43.2	73.3%	54.2%
Age and Sex			
Female	54.4%	51.4%	51.5%
% Under 5 Years	3.0%	4.1%	6.0%
% Under 18 Years	11.2%	16.7%	21.4%
% 65 Years and Over	16.5%	18.6%	14.7%
Median Age	22.0	40.9	38.0
Population and Race *(2010)*			
% White	89.6%	94.7%	70.4%
% Black-African American	3.6%	1.5%	17.6%
% Asian	1.6%	1.1%	8.5%
% Hispanic-Latino	6.1%	3.1%	18.6%
Veterans (2009-2013)	748	5,337	912,499
Income			
Per Capita	$17,796	$24,165	$32,382
Median Household Income (2009-2013)	$37,516	$47,765	$58,003
Persons in Poverty	28.9%	17.1%	15.9%

*Number of housing units includes student housing
Source: US Census 2009-2013; 2010-2014 American Community Survey

D. Workforce and Employment

The City and the immediate region surrounding Oneonta is host to a diverse employment base. The top ten employers within or in close proximity to the City of Oneonta are as follows: Bassett Healthcare (approximately 3,500 employees), SUNY Oneonta (1,188 employees), NY Central Mutual Insurance Co. (936 employees), Springbrook (residential/educational services for the developmentally disabled at approximately 900 employees), County of Otsego (approximately 850 employees), Walmart (approximately 450 employees), Oneonta Job Corps (approximately 370 employees), Oneonta City School District (approximately 365 employees), Hartwick College (approximately 320 employees), and ARC (approximately 270 employees).

Business expansions and contractions in 2014 included:

- Otsego Manor, an Otsego County-run nursing home in Cooperstown, has been sold to Focus Ventures for $18.5 million. The state health department must approve the final sale to privatize the facility at which time company officials plan to hire 'dozens' of employees for their assisted living and day care programs.[11]
- National Freight Inc. has notified the NYS Department of Labor that it will be closing its distribution center located in Johnstown (Fulton County). The closure is attributed to the loss of a contract and will displace 112 employees.[12]

Occupations with the Most Expected Hiring in the wider Mohawk Valley region as reported by NYSDOL include:

- Accountants and auditors, cashiers, home health aides, light truck or delivery services drivers, registered nurses, retail salespersons, and stock clerks and order fillers.

The report, "*Significant Industries: A Report to the Workforce Development System"* (NYSDOL, 2015), describes the current employment state as follows:

<u>Construction</u>
Occupations requiring skilled trades comprise much of the employment within the specialty trade contractors (NAICS Industry 238) sector. Although the specialty trade contractors' industry sector declined from 2009 to 2014, it fared better than the other construction industries. Looking ahead over the next decade, the impending retirement of many baby boomers will contribute to job opportunities in these industries, especially among the skilled trades.

<u>Manufacturing</u>
Food manufacturing (NAICS Industry 311) is the only manufacturing industry on the significant industry list. The industry added 200 jobs from 2009 to 2014 and provides a significant number, 2,400, of relatively high-paying jobs in the region. The average wage ($43,600) was about 14 percent above the all- industry average wage ($38,400) in 2014. The most common occupations in the industry include packaging and filling machine operators and tenders, hand packers and packagers, and food batch-makers.

<u>Trade, Transportation and Utilities</u>
Warehousing and storage (NAICS Industry 493) had been a bright spot in the Mohawk Valley Region. Although employment is down in the past five years, it is a large sector with over 3,500 jobs paying above-average wages. This sector had also been a good fit for numerous workers dislocated from the manufacturing sector.

<u>Professional and Business Services</u>
Professional, scientific, and technical services (NAICS Industry 541) is the one industry from the professional and business services sector on the significant industries list. In the Mohawk Valley Region, professional, scientific, and technical services is dominated by firms that provide legal, custom computer programming, veterinary, engineering, and accounting services. At $51,000 per year, the average annual wage in this industry is $12,600 above the average annual wage for all industries.

[11] WKTV.com, April 24, 2014
[12] www.timesunion.com, February 26, 2014

Educational Services

With 22,600 jobs between the public and private sectors, *educational services* (NAICS Industry 611) have by far, the most employment of any "significant industry" in the Mohawk Valley Region. This sector lost 500 jobs (-2.2%) between 2009 and 2014, but the industry's large size, high wages ($41,600) and projected growth, placed it on this list. Leading job titles include teacher assistant, elementary school teacher and secondary school teacher. Growth in educational services is driven more by demographics than by economic conditions. However, now in 2015 many local school districts throughout New York State are facing severe budget pressures, and many may need to lay-off teachers and support staff, a number yet to be determined.

Health Care and Social Assistance

Growth in health care and social assistance employment is, like educational services, also driven more by demographics than by overall economic conditions. Almost all health care and social assistance occupations are expected to be in demand over the next decade as the Mohawk Valley Region's population continues to age. Four significant industries within the health care and social assistance sector include:

- Ambulatory health care services (NAICS Industry 621)
- Hospitals (NAICS Industry 622)
- Nursing and residential care facilities (NAICS Industry 623)
- Social assistance (NAICS Industry 624)

Of these industries, *social assistance* added the most jobs between 2009 and 2014, on both an absolute and relative basis. *Ambulatory health care services* also added jobs, while employment in *hospitals* and *nursing and residential care facilities* declined. *Nursing and residential care facilities* ($29,900) and s*ocial assistance* ($22,700) have wage levels below the all-industry average. Average annual wage levels at *hospitals* ($57,900) and *ambulatory health care services* ($49,600) in 2014 were much higher than the regional average annual wage ($38,400). This is largely a reflection of the mix of occupations within each industry. For example, in *nursing and residential care facilities*, the two most common occupations are relatively low-paying. They include nursing assistants and home health aides.

Table 24
Significant Industries, Mohawk Valley Region, 2015

Industry Name	*Job Count*		*Net Change in Jobs 2009-2014*	*% Change in Jobs 2009-2014*	*Average Annual Wage 2014*	*Projected % Change in Jobs 2012-2022*
	2009*	2014*				
Total, all industries (all ownerships)	192,300	186,600	-5,500	-2.9%	$38,400	5.8%
Specialty Trade Contractors	2,700	2,600	-100	-3.7	$43,200	18.2%
Food Manufacturing	2,200	2,400	200	9.1	$43,600	5.7%
Warehousing and Storage	4,200	3,500	-700	-16.7	$41,100	2.1%
Prof, Scientific, Technical Services	5,300	4,700	-600	-11.3	$51,000	14.0%
Educational Services	23,100	22,600	-500	-2.2	$41,600	4.1%
Ambulatory Health Care	7,900	8,100	200	2.5	$49,600	25.7%
Hospitals	12,500	11,400	-1,100	-8.8	$57,900	8.1%
Nursing & Res. Care Facilities	11,500	11,000	-500	-4.3	$29,900	18.3%
Social Assistance	7,900	8,400	500	6.3	$22,700	22.7%

**Represents both private and public sector jobs. Source: NYSDOL Division of Research & Statistics*

The median annual wage of the 300 occupations ranked by NYSDOL in 2015 was $37,570 with a high of $146,500 (physicians, surgeons, and dentists) to a low of $16,260 (driver-sales worker). However, the median annual wage of the 19 occupations with the greatest growth potential was $24,160. In terms of estimates for future salary levels the NYSDOL does not make projections for future wage levels.

Unemployment

As indicated in Table 25, although still a full point higher than the low experienced 15 years ago, unemployment rates appear to have stabilized in the Oneonta Micro Statistical Area (MSA).
The 2015 rate is now nearly 2 percentage points below the high unemployment rate in 2010.

Table 25
Annual Average Unemployment Rates

Year	*Oneonta MSA*	*New York State*
2015	5.3%	5.3%
2014	5.7%	6.3%
2010	7.6%	8.6%
2005	4.5%	5.0%
2000	4.3%	4.5%
1995	5.4%	6.3%
1990	5.1%	5.3%

Source: NYSDOL

Income

The Census distinguishes household income as the income of the householder and all other individuals 15 years old and over in the household, whether or not they are related to the householder.
Because many households consist of only one person, household income is usually less than family income. Family income is defined as the incomes of all members 15 years old and over, and related to the householder.

E. Housing Characteristics

Community Housing Organizations

- **Oneonta Housing Authority (OHA**) provides and manages two housing programs: Low Income and Section 8. The Section 8 program provides rental assistance to low-income families living in privately-owned rental properties. Low Income housing is directly owned and operated by the US Department of Housing and Urban Development (HUD). OHA distributes approximately 70 rental vouchers on behalf of HUD that enable applicants to choose where they live in the community and lease from a private landlord that will accept the voucher. OHA manages two public housing projects: Albert Nader Towers (also the owner) and James F. Lettis Apartments.
- **Otsego Rural Housing Assistance, Inc**. **(ORHA)** focuses most of its housing assistance and community development work toward county-wide programs and initiatives. Four ongoing types of capital programs have remained consistent over the past ten years-Home Buyer Purchase and Purchase with Rehabilitation Grant Assistance, Accessibility and Independent Living Rehabilitation, Targeted area Owner Occupied Home Rehabilitation, and emergency repairs for elderly low income homeowners. ORHA also administers the HUD Section 8 rental assistance program through a contract with NYS Department of Homes and Community Renewal (DHCR).
- **Opportunities for Otsego Inc. (OFO),** is a community action agency serving Otsego County providing a variety of programs including Emergency Housing, Safe Housing and Energy Assistance. The Emergency Housing Assistance Program assists individuals and families who are homeless or in danger of becoming homeless.
- **Otsego County Habitat for Humanity** is a nonprofit organization that works in partnership to build or renovate adequate housing in Otsego County. Families are selected based on the need and on the ability to pay for the home.

Housing Types, Condition and Status

Subsidized Housing

Vouchers are distributed based on the funds available for the program. There are presently 70 active vouchers being utilized. The voucher program pays an ongoing monthly subsidy to help with rent and utilities. Applicants are typically required to pay at least 30% of their income toward rent and utilities, and subsidies are limited by fair market rent (FMRs). This is tenant-based program with the assistance is tied to the voucher rather than an individual rental space. Examples of locally available vouchers include:

- Section 8 Housing Choice Voucher: Housing choice vouchers allow very low-income families to choose and lease or purchase safe, decent, and affordable privately-owned rental housing.
- Emergency Solutions Grant (ESG) in support of rapid re-housing: Rental assistance and supportive services that helps individuals or families who are homeless move to permanent housing.
- Housing Opportunities for Persons with AIDS (HOPWA) in support of tenant-based rental assistance (TBRA). This program addresses the need for stable housing for persons living with HIV/AIDS.
- Shelter Plus Care TBRA: Designed to give applicants flexibility in providing housing for homeless persons with disabilities, along with supportive services.

- Supportive Housing Program (SHP) TBRA: This program offers TBRA assistance in which participants choose housing of an appropriate size. When necessary to facilitate the coordination of supportive services, recipients and sub-recipients may require program participants to live in a specific area for their entire period of participation, or in a specific structure for the first year and in a specific area for the remainder of their period of participation.
- New York State HOME Program: The HOME program provides direct TBRA to low-income households who need help paying their rent.

Emergency Housing

Emergency housing may consist of two types of facilities: 1.) A “homeless shelter” is a type of facility that provides temporary residence for homeless individuals and families. These facilities or shelters exist to provide clients with safety and protection from exposure to the weather while simultaneously reducing the environmental impact on the community. Such shelters usually expect people to go elsewhere during the day, returning only to sleep or eat. 2.) An “emergency shelter” provides housing for people to live in temporarily when they cannot live in their previous residence. Emergency housing facilities are typically provided for people fleeing a specific situation, such as natural or man-made disasters, domestic violence, or victims of sexual abuse. Occupants of an emergency shelter are more likely to stay all day, except for work, school, or errands. Homeless shelters and Emergency shelters sometimes facilitate support groups, and/or provide meals.

“Permanent supportive housing” is a combination of housing and support services intended as a cost-effective way to help people live more stable, productive lives. This form of housing works well for those who face the most complex challenges—individuals and families confronted with homelessness and who also have very low incomes and/or serious persistent issues that may include addiction or alcoholism, mental health, HIV/AIDS, diverse disabilities (e.g., intellectual disabilities, mobility or sensory impairments) or other serious challenges to a successful life. Permanent supportive housing can be coupled with social services such as job training, life skills training, alcohol and drug abuse programs, community support services (e.g., child care and educational programs), and case management to populations in need of assistance. This form of housing is intended to be a pragmatic solution that helps people improve their lives while reducing, to the extent feasible, the overall cost of care.

Transitional Housing

Transitional housing provides temporary housing for the certain segments of the homeless population, including working homeless making insufficient wages who have trouble affording long-term housing, and is set up to transition their residents into permanent, affordable housing. It is not in an emergency homeless shelter, but usually a room or apartment in a residence with support services. HUD defines transitional housing as stays of up to 24 months (but stays can be shorter).

Affordable Housing

Affordable housing is properties that were originally built using a tax subsidy and are now required to provide below-market rents for low-income people, persons with disabilities, and seniors. The share of households enjoying “affordable housing,” defined as having housing expenses that are less than 30 percent of household income, declined in the years between the 2000 Census and the 2012 ACS

3-Year Estimate. The 2012 ACS estimates that 50.6% of renters in New York State lived in rental units costing above the affordability threshold. Otsego County reported this figure at 51.4% and represented one of the four highest estimates in the state among upstate counties (excludes Ulster and Sullivan Counties).

Special Needs Housing

Special needs housing typically focuses on providing shelter for persons, who are elderly, physically disabled, at risk of being or are homeless, and/or have extremely low incomes. These special needs populations may include more specifically defined subgroups such as youth aging out of foster care, survivors of domestic violence, persons with severe and persistent mental illness, or persons with developmental disabilities.

Assisted Living

Assisted living provides on-site services to help people with daily living when they are unable to live solitary. It can be either permanent or for a certain period of time. Examples include: nursing homes, long-term care facilities, assisted living facilities, special care facilities, and hospice or respite care facilities. There are three in the Oneonta including Hampshire House, Robynwood Home for Adults, and the Plains at Parish Homestead.

Market Rate Housing

Market Rate Housing refers to properties that are rented or owned by people who pay market rent to lease the property or paid market value when they bought the property. There is no subsidy for this type of housing. A recent survey of rental listings found that there were a limited number of rentals available in Otsego County. While the average rent for one-bedroom unit is approximately the same as the Fair Market Rent (FMR) for the County. However, the current average rent for two-bedroom unit is higher than the FMR, this cost includes utilities. This can be a significant impediment to households receiving Section 8 assistance in the search for affordable housing.

Subsidized and Low Income Housing Profile, Availability and Length of Occupancy

Subsidized and low-income housing needs are currently met by a combination of a government owned and managed facility and several non-profit and privately owned housing facilities. The Oneonta Housing Authority (OHA) owns and manages 112 housing units at the Albert S. Nader Towers on Mitchell Street. The facility consists of 64 studio apartments and 48 1-bedroom apartments. As of OHA's most recent Resident Characteristics Report (RCR) dated June 30, 2015, the 16-month average number of units occupied was 111 out of a total 112 rental units representing an average vacancy rate of 0.89%. Of the 91 households who reported head of household data in HMA's most recent RCR report, 52 (57.14%) were elderly, 39 (42.86%) were non-elderly, 91 (100%) were disabled, 0 (0%) contained children and 0 (0%) were headed by a female. Additionally, OHA manages 58 housing units to complete its housing portfolio (see Table 30).

Mayrose Apartments is perhaps the best example of affordable housing in the City. It is an affordable housing community containing 32 rental units subsidized through the US Department of Agriculture (USDA) Rental Assistance program and cannot exceed 128 persons when fully occupied. This program allows the renter to pay 30% of his or her income for rent while the subsidy pays the difference.

To qualify, a renter must earn 50% or less of the Area Median Income.

Residents of housing subsidized with public rental assistance pay rent based on their income. The rent contribution of the tenant is called the Total Tenant Payment (TTP). The TTP is generally 30% of a resident's income with a $25 (National minimum) to $50 (some PHA's) minimum rent. Based on the information in the most recent RCR (June 30, 2015) the minimum rent in OHA's public housing developments is $50.

The average tenant rent contribution for OHA's public housing developments is $345. The average tenant contribution for elderly residents residing in all properties across the housing authority's public housing portfolio is $194. The average rent payment for disabled residents is $185. The average TTP for non-elderly, non-disabled renters in the housing authority's public housing units is $370.

HUD divides household income into four categories: Extremely Low Income (ELI) for households earning less than 30% of the median, Very Low Income (VLI) for households earning between 30% and 50% of the median, Low Income (LI) for households earning between 50% and 80% of the median and Above Low Income for households earning 81% of the median and over. Of the public housing residents residing in Oneonta Housing Authority properties, 25 were Extremely Low Income, 51 were Very Low Income, 28 were Low Income and 7 were Above Low Income. The average annual income of public housing residents living in Oneonta Housing Authority properties is $15,741. Of all public housing residents, 12% earn more than $25,000 while 88% have incomes that fall between $0 and $25,000.

Table 26
Low Income Eligibility Details for Otsego County 2015

Household Size	*Extremely Low Income*	*Very Low Income*	*Low Income*
1 Person	$13,100	$21,850	$34,090
2 Persons	$15,930	$24,950	$39,900
3 Persons	$20,090	$28,050	$44,900
4 Persons	$24,250	$31,150	$49,850
5 Persons	$28,410	$33,650	$53,850
6 Persons	$32,570	$36,150	$57,850
7 Persons	$36,730	$38,650	$61,850
8 Persons	$40,890	$41,150	$65,850

Source: HUD

According to the RCR as referenced above, there were a total of 111 households containing 125 persons residing in the OHA facility at Albert S. Nader Towers yielding an average household size of 1.1 persons per unit. Furthermore, 0% of households at Nader Towers included children as 0% are aged zero to five, 0% are aged 6 to 17, 36.8% were aged 18-61, and 63.2% were considered "senior" at age 62 or older.

The HUD RCR report includes data regarding the length of occupancy indicating that 18.02% of all families residing in the facility have lived there for less than 1 year, 12.61% have resided there for 1 to 2 years while 69.37% have resided in the facility for more than 2 years.

Housing Conditions

In 2011, the State University (SUNY) at Albany prepared a summary of land use and housing conditions for Otsego County. The report utilized information from the land use classification system and data from housing condition sub-modules to summarize land use and housing conditions for each municipality in the county. In consideration of the long-established land use pattern in the City the land use and condition information as contained in the SUNY Report is thought to be a representative of the current status. According to the NYS Office of Real Property Tax Services there are 3,594 parcels in the City of Oneonta. This report was accessed as a means to convey the condition of housing throughout the City.

The sub-module from the assessment data which was the basis for the SUNY Report's analysis used the following methodology to gauge the interior and exterior condition of the primary residence:

> ***Poor*** - Severely dilapidated structure with no functional utility and considerable physical deterioration. This structure is uninhabitable, and is often found abandoned.
>
> **Fair** - Interior will require some maintenance. Some major repairs may be necessary but the property generally is inhabitable even though physical deterioration is evident and functional utility is reduced.
>
> ***Normal*** - Most properties exhibit this condition. Normal "wear and tear" is evident with only minor signs of deterioration. Functional utility is normal, as are the living conditions present.
>
> **Good** - This is a "like new" appearance. Many new homes which have only been inhabited for a short period exhibit this condition. No repairs of any consequence exist. Recent renovation is usually the cause of this condition in older properties.
>
> **Excellent** - Indicates the interior of the structure is new in appearance and use. New construction and renovation just completed usually are the only residence interiors in this condition.
> Few, if any other structures will exhibit this condition because no physical deterioration or diminished functional utility can exist.

The report then offered the following guidance relating to the determinations of condition:

- When determinations were made relating to the interior condition, consideration was given to the following items: walls and ceilings, interior finish, flooring, fixtures in bath and kitchen areas, electrical, heating and plumbing systems.
- When determinations were made to exterior condition, consideration was given to the following items: exterior finish, roofing, foundations, chimneys, windows and doors.

On the basis of the above methodology the SUNY Report provided the following summary of housing condition:

Table 27
City Of Oneonta Housing Conditions

	Total	Condition				
		Poor	Fair	Normal	Good	Excellent
Condition	2,614	15	436	1,844	309	10

Source: Real Property System Data

The residential uses classified as being in "poor" or "fair" condition comprised 17.3% of the total parcels classified as having a residential use. Furthermore, of the 15 residential use parcels determined to be in poor condition 14 were single family and 1 was a three-family. Therefore, since a majority of the residential uses occurring in the study area are housed within multi-family buildings, the summary of condition as outlined in the SUNY Report indicates that a majority of the housing conditions in downtown are in the "fair to "good" range.

As a means to confirm the information derived from the SUNY Report a "windshield survey" of exterior building condition across the study area was conducted using the same conventions for levels of condition as described above. The results of the survey were largely consistent with the information derived from the SUNY Report, with one exception that may be worthy of further analysis. The exterior conditions noted at the James F. Lettis apartments at the corner of Watkins Avenue and Fairview Street demonstrated signs of wear among exterior building elements (roof, exterior finish, windows and doors). Furthermore, the buildings were constructed in 1981, and many of the building elements may be near the extent of useful life. The observations made were limited as the conditions were noted from the exterior only and an interior assessment was not conducted. Therefore, a more in-depth and detailed assessment of exterior and interior conditions may be a consideration.

Housing Data by Census Tract

Housing information relating to the number of units, family unit type, and occupancy type is accounted for in the census by census tract. The City of Oneonta is within five census tracts: number 5909, 5910, 5911, 5912, and 5913. The study area is within two of these tracts 5909 and 5911

Table 28
Housing Unit Types By Census Tract 2015

City of Oneonta Census Tracts (CT)						
	CT 5909	**CT 5910**	**CT 5911**	**CT 5912**	**CT 5913**	**Totals**
Total Housing Units	1,313	1,740	1,759	455	10	5,277
1-4 Family Units	988	1,482	1,265	455	10	4,200
Median House Age	71	71	67	71	71	70.2 avg
Owner Occupied Units	537	569	452	311	10	1,879
Vacant Units	133	188	160	58	0	539
Owner Occupied 1-4 Family Units	537	569	452	311	10	1,879
Renter Occupied Units	643	983	1,147	86	0	2,859

Source: FFIEC Census Reports

CT encompasses study area.

Fair Market Rents

The FMRs tracked by HUD are consistent with rates identified in local research conducted of apartment complexes and listings posted in local newspapers.

Table 29
Fair Market Rents 2015

Otsego County	
Number of Bedrooms	**Rent Guidelines**
Efficiency	$624
One-Bedroom	$676
Two-Bedroom	$839
Three-Bedroom	$1,127
Four-Bedroom	$1,198

Source: HUD

In terms of the anticipated rents that can be supported in new rental units coming into the region, the FMRs should be viewed as a baseline amount that can be supported in the market area. Rent charges vary significantly depending on the services and amenities included or provided by the landlord.
The inclusion of utilities (heat and or electric), snow removal, laundry facilities, maintenance, grounds maintenance, security systems, etc. add value and can be justification for increasing the monthly rent. Furthermore, amenities such as fireplaces, enhanced floor treatments (hardwood, tile, etc.), the use of "green" or sustainable building materials, the availability of high efficiency appliances and heating systems, and the application of "high-R" or Energy Star insulating practices are examples of amenities that add value and further justify monthly rent charges beyond FMRs.

Therefore, based on the research and assessment of the existing rental housing market, the monthly rents listed in the table above accurately reflect rents that can be supported based on the demand within the market-area. However, these should be considered as supportable rental charges for basic units for the bedroom size listed. The provision of additional services and/or amenities justifies corresponding increases in rent. The specific amount of increase will vary depending on the extent of additional services and amenities offered and the efficiency by which the amenities are installed and services are provided.

Interviews were also conducted with a number of housing authorities across the Tri-Lakes Region. Results from these interviews suggest that all rental complexes that provide subsidized units operate at greater than 95 percent annual occupancy. They further indicated that their Section 8 Housing Assistance programs are full and often have a waiting list of people looking for assistance. These two factors further suggest a greater need for subsidized rental units within each of the communities.

Table 30
Subsidized and Low Income Public Housing Units

Name of Complex	***Ownership/ Management***	***Housing Type***	***Number of Units***	***Waiting List***	***Condition Needed Improvements***
Albert S.Nader Towers	OHA/ OHA	7-story public housing for age 62+ and disabled with qualifying low income. Efficiencies and 1-bedroom	112	1 year for efficiencies 1.5 years	Convert heat from 100% electric, convert to LED lighting
Academy Arms	Private/ OHA	Section 8 assisted senior and disabled rental living units.	28	Always Full 1.5 years	Updated and in good condition
James F. Lettis Apartments	Nonprofit/ OHA	HUD project with rent-assist rental units for very or extremely low income families with majority of units with Section 8 vouchers.	30	1.5 years	Needed improvements to exteriors of 5 buildings including weatherization and window replacement. Cost estimated at $500,000
Mayrose Apartments	NA	USDA Rental Assistance To qualify, a renter must earn 50% or less of the Area Median Income	32	Always Full	Good condition

Source: Interviews with Kurt Shulte, executive director of OHA & Jeff House, Oneonta Housing Rehabilitation Specialist

Housing Demand and Opportunity

The demand for housing in the city of Oneonta is largely driven by students enrolled at nearby Hartwick College and SUNY Oneonta. It is estimated that there are 2,000 total students, or one-third of those enrolled, living off campus in 950 rental units. As the on-campus SUNY Oneonta dormitories have filled, the demand for off-campus housing remained strong. Although enrollment has been stable over the last few years, SUNY Oneonta is projecting enrollment will grow to 6,229 students by 2018 resulting in an overall increase in approximately 164 students.

In 2014 a private developer completed construction of Hillside Commons, a 117-unit complex exclusively developed as housing for 330 students at SUNY Oneonta. Priced competitively and attractive because it is new and close to campus, Hillside Commons has had the impact of significantly reducing student demand for rental apartments in downtown Oneonta. Hillside Commons impacts the rental housing market by freeing up the supply of apartments and houses for young working people and families who cannot yet afford a house of their own. However, this shift has not yet occurred in any significant way because the demand for this market is not as strong, the housing conditions are less attractive, and the rents are not affordable for families.

Another contributing factor to decreased demand has been declining student enrollment at Hartwick, down approximately 150 students from its 10-year average to a total of approximately 1,392 students in 2015. Approximately 350 students live off of the Hartwick campus. The expected new construction of an 80-bed residence hall will likely reduce the number of students desiring to live off campus, of which only seniors are permitted. Another impacting factor is the closing of the Oneonta Campus of Utica School of Commerce (300 enrolled students) due to declining enrollments.

The City believes there is a growing market for young professionals and working families and wants to be proactive in making sure there is adequate housing that meets their needs. Currently these potential residents are priced out of the rental or buyers housing market. The rents are too high for their pay scale and they cannot meet the requirements for first time home buyers. There are some recent trends that suggest this scenario may be shifting. A review of multiple listings by the New York State Association of Realtors for 2015 yielded the following information regarding Otsego County housing:

- There were 71 new listings in January 2016 representing a 16% raise over 2015.
- There were 22 closed sales representing a 29% rise above 2015 levels.
- The median sales price was $112,680 which represents a 2% rise above 2015 levels. Statewide levels are $235,000.
- A total of 123 homes were sold between January 1, 2015 and January 1, 2016 reducing the inventory of homes for sale from 719 to 596 and lowering the month's supply by 36% to 14.2. This was a statewide trend with the number of homes for sale dropping by nearly 7%.

As previously mentioned, the development pattern of the City has long been established leaving few parcels available for new housing units to be built. When new proposals have been made they have generally limited to townhouse type units with target populations as seniors, students and young professionals. There is the new potential for houses and apartments downtown to be marketed to workers at IOXUS Ultra-capacitors, Bassett Healthcare, A.O. Fox Hospital, Hartwick College, Springbrook Residential Services, and SUNY Oneonta. Potential new temporary residents could evolve from the new natural gas pipeline, traveling nurses, Corning, and home health care workers. The shift from student housing to apartments for working adults and young families will require significant investment by landlords. This may make it challenging or even impossible for property owners to meet the price point of the prospective pool of lessees.

Senior and low income housing facilities within the City are generally full with extensive waiting lists. These Oneonta facilities are not located close to needed facilities such as grocery stores and doctors. In response to this critical need for quality senior housing, a development known as *Oneonta Heights* began construction in 2016. The project consists of six new buildings and one rehabilitated building. The buildings will be built is clusters throughout the City. The building to be rehabilitated addresses a long vacant blighted property in the city. The centerpiece of the project will be a new 40-unit senior building equipped with a community gathering area, computer lab, kitchen, laundry facilities and on-site property management office.

Figure 10 – Concept for Oneonta Heights

F. Housing Issues and Gaps

The City of Oneonta Housing Task Force that developed the *Comprehensive Housing Plan (CHP)* in 2013 as an addendum to the 2007 Oneonta Comprehensive Plan identified five underlying issues in the city. Participants of the referenced task force were interviewed in part of the information collected for this housing analysis. The discussions with participants of the CHP's development yielded a range of opinions as to the issues that remain relevant.

The synopsis of opinions expressed is as follows:

- "The quality of the housing stock is not being maintained."
- "There are few rental units with rents that are affordable to all levels of the income spectrum."
- "Community and government obstacles to housing initiatives exist."
- "There is a general lack of funding to support housing initiatives."
- "Vacant floors in downtown buildings and vacant houses in residential neighborhoods have an overall negative impact."

The Lack of Maintenance

According to the City's Housing Rehabilitation Specialist, the overall condition of housing is generally good, but rapidly aging. Over 65% of the housing stock in Oneonta was built before 1939 which is reflected in maintenance and code compliance issues. The center City has a low percentage of individual housing that is at fair rental market prices. In many cases it is also substandard (according to HUD guidelines) and a number are scattered among homes that are in better condition. According to the *Comprehensive Housing Plan*, the eastern end, sixth ward, and parts of the Chestnut Street area have some higher concentrations of substandard housing. Enforcement of the NYS Building Code and City Housing Code is an active component in the rental housing industry. However, limited enforcement resources are stressed with the increasing workload involving increased abandoned properties.
As previously mentioned, an example of low income public housing that is in need of rehabilitation is the James F. Lettis Apartments. Evident by the minimum 18 month waiting period for a unit, these 30 apartments serve as a critical resource for individuals and families with low or very low incomes.
The "windshield survey" of building conditions conducted in preparation of this study indicates that a further, more detailed assessment of the exterior and interior building conditions of the buildings should be conducted as a means to confirm the extent of improvements that may be warranted.

The Lack of Affordable Rentals

There is presently a gap in affordable housing in the city. This type of housing refers to properties that were built using a tax subsidy and are now required to provide below-market rents for low-income people. For example, at the current average asking rental price of $657 per month and considering a typical unit requiring 30% of annual income, a minimum annual income of $26,280 would be required by a household. Based on the income distribution, approximately 7,387 (30.0%) of the households within Otsego County have incomes below $26,280 and would need to expend greater than 30% of their income for the average asking rent for housing currently available in Otsego County. The lack of affordable housing has a direct link to the ability for employers to attract and retain workers.

The demand for beds for homeless and at risk populations exceeds the supply and the waiting lists are long. There is only one homeless facility in Otsego County with a maximum occupancy 18 people.
It runs at an average 70% capacity because some of the demand is generated by families who must be housed in area motels that are since they are restricted from staying at the shelter.

Obstacles to Housing Initiatives

Historically, landlords have charged rents to students based upon the highest they can get from that property plus the repairs and other annual maintenance costs that tend to be higher with student renters. Mortgages are based on the higher rents leaving the landlord with little choice but to continue charging the higher rent after the demand for housing from students has diminished. The problem is amplified by the fact that landlords have to continually upgrade properties to meet apartment building and other codes and to adjust to a different renter's market. The rents they feel they must demand exceed the ability of potential renters in the affordable or market rate housing to pay. As a result many houses are going unrented and this is contributing to blight and bringing down home values in many neighborhoods.

Lack of Availability of Funding

The City has implemented several programs in the past few years including HOME, First Time Homebuyers and Housing Rehab programs. Currently, the City is finishing a First Time Homeowner Grant and has initiated a city-wide residential rehabilitation program through funding from the NYS Office of Community Renewal. Yet, the perception of a lack of affordable units for low to moderate income young families and singles persists. A potential contributing factor to this perception is an impression among many developers that commercial lending standards are highly restrictive and not conducive to providing the needed financing to construct new, affordable units.

The home purchase market is also challenging in the City. Homebuyers need a 740 or better credit score plus cash down payments before banks will consider granting mortgage loans. Matching qualified individuals and families with homes they can afford is a continued source of frustration for realtors.

As a general consideration, the current economic climate continues to provide obstacles for low to moderate income working individuals and families seeking affordable housing in the City of Oneonta. A myriad of tools, programs, and partnership models have evolved over time to help leverage the number of such housing units in neighborhoods and communities throughout New York State. These programs and tools include publically funded programs as well as programs offered through lending institutions. These include:

<u>New York State and Otsego County:</u>

- **Affordable Home Ownership Development Program (AHOD)** – a grant program NYS Affordable Housing Corporation to governmental, not-for-profit and charitable groups to build, acquire/rehabilitate or improve homes for low and moderate income families.
- **Federal American Dream Down Payment Act** - NYS offers grants, as part of this act, to jurisdictions) to "…assist low-to-mid income families-2-uniformed employees such as police, firemen, sanitation, maintenance workers and teachers who are employees of the partnering state to achieve home ownership."
- **Construction Incentive Program** – available to first time buyer in Otsego County homebuyers who are purchasing a home under rehabilitation.

<u>Programs offered through lending institutions:</u>

- **State of New York Mortgage Assistance (SONYMA)** -several programs available to individuals.
- **Achieving the Dream** – available to lower income first time homebuyers at lower interest rates than other SONYMA programs.
- **Homes For Veterans** – allows military veterans to apply to SONYMA Programs at more favorable terms.
- **Remodel New York** - supports the purchase and financing the cost of renovation with one, fixed rate mortgage.
- **Low Interest Rate Program** – standard SONYMA mortgage program for homebuyers purchasing an existing home (need not be a first-time buyer).

Vacant Floors in Downtown Buildings and Vacant Houses

Vacancies in downtown buildings and vacant houses in residential neighborhoods have a blighting effect on neighborhoods and will ultimately bring down property values. Even if landlords want to upgrade properties they are faced with addressing code issues such as lead paint and asbestos issues, in addition to energy audits and all the other repairs. Building code violations exist on many if not most of the buildings downtown. In addition, in order to make many of the upper floors code compliant it requires elevators, sprinklers and other improvements which make many renovations cost prohibitive for property owners.

One of the tools the City has been employing is the local law known as the “Vacant Building Registry.” According to Code Enforcement Officer Robert Chiappisi, this provision has been in place since 2000 and was last updated in 2011. It mandates owners of vacant buildings to register the property with the Code Enforcement Office and provides incentives for owners to sell or lease the buildings in order to avoid paying fines that range from $500 the first year to a cap of $2,000 for the fourth year and beyond. This strategy has paid off for the City. There are a total of approximately 82 vacant and unoccupied properties in the city in early 2016. According to Mr. Chiappisi, this represents a reduction in about 50 properties that were renovated and are now actively leased out. One of the obstacles to this program is that there are many properties in foreclosure. Once the banks take ownership, they are more willing to just pay the annual fine rather than take action to bring the property to a value where it can be successfully sold.

Developing Housing Markets

The fastest growing new housing markets focus on the 2nd and 3rd floors on Main Street properties. The downtown area of the City was historically a thriving commercial and retail district. Due to economic downturn in the 1960’s and 1970’s, the redevelopment of this area had stalled and many projects became financially unfeasible. However, in recent years the City has demonstrated success with encouraging downtown property owners to invest in these historic properties to create a mixed use environment through reutilization of existing buildings that have vacant second and third floors. The recent success with incentivizing reuse and revitalization of several downtown buildings will encourage investment in other buildings and sites in the downtown area.

Recent examples of such projects include:

- The Oneonta Theater restoration with a restored theater on the first floor and apartments on the upper floors.
- The Breese Redevelopment Project which rehabilitated and repurposed the former Bresee's Department Store (closed for 20 years) on Main Street into a mixed use building. The $6.5 million project now known as "Klugo's Parkview Place" has 4 commercial/retail spaces on the first floor and 17 market-rate apartments on the upper floors. The project was completed utilizing a public-private partnership and a combination of public funding and private financing to help acquire, demolish and restore three vacant, deteriorated buildings in the west end of Main Street. A total of 54,340 square feet of secondary buildings was demolished and the original buildings, their historic facades, and an adjacent 39,600 square foot carriage house were fully rehabilitated. This trend appears to be gaining momentum as there are several additional buildings that are in the planning stages for mixed use development and residential space on the upper floors.

One of these future projects includes rehabilitation of a building that was funded in part, through the state's Consolidated Funding Application annual grant cycle is the conversion of the Stevens Hardware. This project is in its formative stages and plans include rehabilitation of the building's upper floors into 5 market rate apartments with commercial space on the first floor.

Figure 11 – Main Street Oneonta Circa 1950

G. Housing Recommendations

<u>Findings</u>
The Housing Needs Assessment (HNA) as conducted in this report analyzes current housing conditions in the community and presents a summary of housing characteristics for the downtown area and the city of Oneonta. These findings and recommendations will be useful to housing officials, builders, and potential homeowners with information and data that can be utilized to secure funding assistance and investment capital. It will also be utilized to attract qualified persons, investors, and/ or businesses in the renovation of existing buildings and rehabilitation of the existing housing units.

Strategies

Based on the discussions held with members of the former Housing Task Force that reviewed housing needs throughout the City the following observations were offered as consideration is given to the housing element of the overall strategy for future redevelopment:

- Continue to expand the diversity of housing options to the public. Emphasis should be on providing market rate housing in the form of apartments and single family homes.
- Continue making improvements to land, use review procedures to assure timely and objective decisions. Review and simplify building codes and regulations to the greatest degree possible to encourage building rehabilitation without jeopardizing public safety and welfare.
- Provide broad access to a wide range of housing information via the City's website. Design the site to developers, landlords, buyers and leases.

Regarding the issue of vacant buildings, the City of Oneonta in recent years has taken a series of steps in an effort to quantify the number of vacant properties and residential units in the City and incentivize their reuse. These laws and existing enforcement programs should continue to target vacant properties so that safety, building stabilization and neighborhood blighting issues can be addressed:

- *Ordinance #1, 2014* - Repeals Article V of Chapter 86 of the Municipal Code entitled "Nonresidential Buildings and Vacant Residential Buildings" and amending Chapter 158 of the Municipal Code by the addition of a new provision entitled "Vacant Building Registration."
- *Local Law #1, 2014* - Provides for the exemption of multiple dwellings constructed or substantially rehabilitated within the City from taxation and special ad valorem levies, but not special assessments for residential improvements for the physically disabled, as authorized in section 459 of the New York State Real Property Tax Law.
- *Local Law #2, 2014* - Provides for the tax exemption of certain improvements or modifications made pursuant to the Americans with Disabilities Act of 1990 to real property within the City from taxation and special ad valorem levies, but not special assessments, as authorized in section 459-a of the New York State Real Property Tax Law.
- *Local Law #2, 2013* - provides for the exemption of cooperative, condominium, homesteading or rental projects from taxation, in accordance with the provisions of §421-e of the New York State Real Property Law.
- *Local Law #3, 2013* - Provides for the exemption of multiple dwellings constructed or substantially rehabilitated in a benefit area set forth herein from taxation and special ad valorem levies, but not special assessments, as authorized in §421-m of the New York State Real Property Tax Law.
- *Local Law #4, 2013* - Provides for a partial exemption from real property taxation for newly constructed homes purchased by first-time homebuyers as authorized in §457 of the New York State Real Property Tax Law.
- *Local Law #5, 2013* - Provides that certain improvements to real property meeting certification standards for green buildings shall be exempt from taxation and special ad valorem levies in accordance with the provisions of §470 of the New York State Real Property Law.
- *Local Law #6, 2013* - Provides for partial exemption from real property taxation and special ad valorem levies for non-residential property converted to a mix of residential and commercial uses, as authorized in §485-a of the New York State Real Property Tax Law.

Despite these strategies, vacant buildings, particularly upper floors within several prominent buildings downtown, remain. Such a circumstance presents challenges at several levels:

- Space which remains vacant for a prolonged period contributes to a blighting effect eventually resulting in reduced property values and overall decline economic activity.
- The high rate of exempt properties that the City supports, the loss of value due to prolonged vacancy and the associated reduction of real property tax revenue places stress on the annual City budget and ultimately the other property owners in the City.
- Vacant properties also contribute to "opportunity loss". Successful downtowns at both an economic and social level result from a dynamic mix of uses occurring within each building. Vacant spaces suppress this dynamic and are a drain on the overall quality of life in this vital area.

Therefore, the following additional strategies are suggested to further complement the steps the City has taken:

- Undertake further and more detailed assessment as to the exterior and interior conditions present at the James F. Lettis Apartments along Fairview Street. Based upon the finding of the detailed assessment performed consideration should begin to an appropriate level of rehabilitation to ensure the long-term viability of the housing units, or if conditions warrant, consider complete replacement of the housing units on a one-for-one basis directly on-site. The net result whether the need be rehabilitation of the existing buildings or complete reconstruction is to sustain the property as a long-term option for the provision of safe and affordable housing for income qualified persons
- Closely monitor the annual fee associated with the Vacant Building Registry that builds in a progressive scale that increases the annual fee should the vacancy continue occur over a long-term. Consider applying this fee to instances where only a portion of the building – as per the definition in the current City Code is vacant (i.e. the second and/or third floor).
- Working with similar-sized Upstate urban communities that have downtown areas with underutilized upper floors to address potential revision of State codes to make reuse of upper floors affordable.
- Continue to maximize sponsorship of funding applications which offset the redevelopment costs and incentivize redevelopment and private investment as occurred with Klugo's Parkview Place project.
- Explore a partnership with Housing Visions Inc. to continue to identify and develop affordable housing options for working families and seniors.
- Consider marketing strategies for increased occupancy of the Armory building.
- Obtain air rights to the parking lot so as to construct market rate apartments with mixed use format that maximizes the impact of redeveloping vacant space.
- Consider setting up a community housing trust with partners that would have the powers to acquire vacant sites, rundown and abandoned properties and tax delinquent properties. Review the outline of the Mohawk Valley Land Bank to see if this could develop into a viable option for the City.
- Develop an informational packet of materials that provides a comprehensive accounting of existing City incentives and initiatives to promote housing redevelopment and new development. The packet is intended to serve as a complete summary of the incentives and initiatives offered, including a regularly updated inventory of available properties and sites, contact information, and an explanation of next steps.

- Assess the status of old housing loan programs with money remaining as to how this money can be repurposed.
- Conduct a city-wide assessment of available vacant and/or underutilized properties that may suitable for new housing. The configuration of the new housing should consider the context of the surroundings to ensure that the new structures complement the neighborhood context in which they will exist.
- Review current code enforcement procedures to make sure that ongoing property maintenance is in compliance with current standards.
- Assess the Elks Club property for private development.
- Seek government financial support and incentives for market rate housing.

VI. REVIEW OF MARKETING PROGRAM

A. Introduction

The downtown Oneonta "brand" and ability to effectively market the brand are important elements to the success of the downtown area itself and how it is perceived in both the primary and secondary markets. Perception and constant maintenance of the brand and marketing effort is particularly important as downtown evolves within the 21st century and the technologically driven media formats that are increasingly available to the consumer. Therefore, as an ancillary and complementary component of the overall strategy development a review of the marketing program was conducted and three basic attributes of downtown became clear:

1. *Oneonta is authentic.*
2. *Oneonta is about the people.*
3. *Oneonta is the heart of New York State.*

The culmination of the review conducted was to suggest ideas as to how best to market downtown Oneonta. Through research of the area's attributes and landmarks and expertise with tourism and municipalities, 4 creative solutions to market Oneonta were devised, from concept and strategy to visual execution. The goal: Celebrate and promote a distinct brand, unique to Oneonta.

B. Research

Engaging with generations ranging from Millennials to Baby Boomers, our research included the:

1. *Who?*

In order to determine who the target market is marketing as a topic was discussed at each of the focus group meetings with:

- Downtown business owners
- Downtown property owners
- Residents of downtown

Interviewed various stakeholders from:

- City of Oneonta officials and staff
- Representatives from Destination Oneonta
- Representatives from SUNY Oneonta
- Representatives from Otsego Now
- Individuals outside of the area (family, tourists/travelers, students)
- Informal and random, one-on-one discussions while in the downtown area

2. *What?*

Specific questions regarding Oneonta and the surrounding area were asked relating to current brand perceptions – What makes it unique? What are its best-kept secrets? What are its pros/cons? What are the opportunities within the region? In addition, questions were posed as to favorite destinations to visit and what makes them so unique and memorable.

3. An analysis was then undertaken of the existing program and its strengths, weaknesses, opportunities, and threats (SWOT). Additionally the analysis considered the downtown area and its position within the market place.

The basic aspects of the marketing analysis as performed are as follows:

- When? The majority of research was completed between November 2015 and February 2016.
- Where? Research was done among business locations across the City, on the SUNY Oneonta campus, and in the region surrounding the City.
- Why? It was vital to get feedback from specific groups. While one-to-one research garnered the best feedback of local opinion, it was important to include perceptions outside the area– this cast a wider net on a population that will most likely be attracted through both traditional and digital/new media.
- How? Feedback was obtained through survey questions, live interviews, phone interviews—tallying results and filtering to find commonalities.

C. Results

General "brush strokes" were looked for in terms of common answers (pros vs. cons), unique answers among common answers (commonly referred to as "golden nuggets"), responses that come directly as quotes from interviews, unique descriptions, factoids and testimonials from surveys, and direct quotes that actively describe the area in a unique way.

The data suggested that Oneonta is about the people that choose to live, work and play in the area. The information garnered also suggested that Oneonta is a secondary consideration when compared to more popular and perhaps widely known areas like Cooperstown, but yet it serves an important role in peripheral businesses such as spillover for lodging, dining, entertainment, and recreation. Additionally, pairing the two main higher education institutions of the City make it a college town, thus offering activity not typically seen in such a small region.

D. Approach

Step 1 – *"Use What You've Got"* – The best way to approach brand development is with sincerity and honesty as you do not want to over-promise and under-deliver. The basic goals for the Oneonta brand and marketing efforts are to:

4. Suggest a realistic approach
5. Seize opportunities in places of impact
6. Cast Oneonta in a positive and active way

The overarching key to seizing marketing opportunities, especially with limited budgets is to "*use what you've got*" or "*turn your biggest asset into a strength*".

Step 2 – *"Pick a Direction"* – The four (4) solutions suggested below each take a unique direction. Each creative direction can work in its own way, but points to a positive strength of Oneonta.

In considering a direction several pertinent questions are posed: Can Oneonta be known as the cultural center of the region with "The Arts and Entertainment District"? Or should Oneonta tout its recreational activities and be a place to explore with "Outdoor Adventure"? Or is Oneonta a unique place to visit with "Authentic Oneonta"? Finally, does a city of open arms have a "Welcome Home" vibe?

The answer to all of these is “yes”. But in terms of branding, Oneonta must point in one direction, not all of them. Again it can experiment with targeting certain audiences through a series of campaigns over the course of time, but it is essential to the success of the marketing program to select one brand and positioning.

<u>Step 3</u> – “*Be Consistent”* – The other key factor is to be consistent, choose a direction, and support it 100%. Secondly, use repeat impressions and manage the brand with precision (do not stray with different versions or messages). It’s important to note that while Oneonta can experiment with various messaging through advertising campaigns and certain marketing tactics, the main brand must be steadfast and always point in the same direction.

From concept to the execution, the Oneonta brand must do three things:
- Be Authentic
- Be Unique
- Be Memorable

<u>Step 4</u> – “*Competitive Positioning” –* One of the central elements of any marketing program is the “tagline”, which is a short phrase designed to form a dramatic effect. During the review of the current marketing program there was some discussion about reverting from the current tagline which is “Life Enjoyed” to the prior tagline “City of the Hills”. However, the discussion began to garner an emotional response to the point of distraction. Hence, it is recommended that a potential revision to tagline be explored as a separate process beyond the initial marketing effort.

Therefore, moving beyond discussion of the tagline four directions should be considered as means to position and distinguish Oneonta in the market place. These directions can be seen on the following pages, along with a brief description and visual suggestions for each.

1.) The “*Arts and Entertainment District*”

Key elements of this direction include:
- Positioning downtown Oneonta as the cultural center of the region
- Establishing perception as “The hip place to be”
- The principle elements of this theme include: Music, restaurants, night life, and fun

Strategic media suggestions: Sponsor bands, festivals, and entertainment. Examples of existing elements to build upon include:
- The B Side Ballroom and Supper Club
- Foothills Performing Arts Center
- The Oneonta Theatre
- Hartwick and SUCO Performing Arts
- Orpheus Theatre
- Community Arts Network of Oneonta (CANO)
- Carriage House Arts Studio

Figure 12: Marketing Theme Alternative 1 – Bannering signage, website, social media, and stationary.

2.) "*Outdoor Adventure*"

Key elements of this direction include:

- A place worth exploring. Healthy lifestyles, activity options. Get the message into outdoor adventure media as the hidden gem, undiscovered country.
- Could complement the City's reputation as the "City of the Hills" through emphasis on hiking, mountain biking, trail running, snowshoeing, rock climbing, all-terrain vehicle (ATV) tours, snowmobiling, and skiing. And there is potential for tie in with Catskill Mountains ski areas.

Strategic media suggestions: Sponsor events at venues, including a branded kiosk and collateral or giveaway. Examples of complementary elements to this theme include:

- The Susquehanna Greenway
- Riddell State Park
- Neahwa Park
- Homer Folks State Forest
- Wilber Park
- Belleayre Mountain
- Hunter Mountain

Figure 13: Marketing Theme Alternative 2 – Bannering signage, website, social media, and stationary.

3.) "*Authentic Oneonta*"

Key elements of this direction include:

- Experience something unique
- The After Party (the cool place to be)
- An authentic experience not found anywhere else

Strategic media suggestions: Combination of well-placed advertising, digital, public relations, and branded signage throughout the area that emphasize:

- Roots Brewing
- Brooks Barbecue
- Fabulous Fridays
- Snommegang
- Architecture

Figure 14: Marketing Theme Alternative 3 – Bannering signage, website, social media, and stationary.

4.) *"Welcome Home"*

Key elements of this direction include: A "City with Open Arms," "Build Your Life Here," "Start a Family Here," or "A Place Where Life is Happy." Marketing of this option would be themed upon "the Emerald City/Oz" vibe to families as friendly and inviting.

Strategic media suggestion:

- Train caboose kiosk/display
- Affordable
- Walkable
- Safe
- Healthy
- Convenient

Figure 15: Marketing Theme Alternative 4 – Bannering signage, website, social media, and stationary.

In summary, the City of Oneonta and particularly the downtown area have some distinguishing attributes that if carefully acted upon and creatively developed could be woven into a compelling and productive marketing program that would yield benefits of increased customer traffic and to a wide spectrum of business types in the downtown area and throughout the City. Acting upon the implementation process would include undertaking the steps listed above to select one of the four marketing themes and launching the new program through the associated strategic media formats.

VII. INFRASTRUCTURE ANALYSIS

A. Introduction

A review of the infrastructure within the Study Area has been coordinated with the City Department of Engineering. For the purposes of this study the review of infrastructure includes water supply and distribution, wastewater collection and disposal, storm water management.

B. Water Supply and Distribution

Existing Conditions
Oneonta's water source is drawn from Wilber Lake and the Lower Reservoir located off Upper East Street, and the Catella Park Well located in Neahwa Park. The Water Treatment Plant is located at 110 East Street. The Chief Operator is Stanley Schaffer.

The water flows by gravity from the Lower Reservoir, and is pumped from the Catella Park Well (when in use) through the Water Treatment Plant. After filtration, disinfection, pH adjustment, fluoridation, and corrosion control treatment the water is pumped to storage tanks and the distribution system.

The water system serves about 16,000 people in the City of Oneonta and parts of the Town of Oneonta. The total water produced in 2014 was 625 million gallons. The daily average of water treated and pumped into the distribution system was 1.71 million gallons. The highest single day was 2.82 million gallons.

Planned Improvements
The water distribution system is typical for a city of Oneonta's age. Many of the water mains and appurtenances are aging but have been well maintained. The City has identified areas where upgrades are needed and these are listed in the capital improvement plan. Within the economic development study area, the Ford Avenue water main may be replaced in 2018 and the Elm Street main by 2025. In discussions with the City Engineer, it is clear that the City has a good understanding of the water treatment and distribution system condition and needs. The current capital improvement plan should continue to be implemented and additional sources of funding pursued to upgrade the water supply system.

C. Wastewater Collection and Disposal

Existing Conditions
The Wastewater Treatment Plant is owned and operated by the City of Oneonta. Built in 1973, it was put into operation in 1974. Major upgrades were made in 1994 to enhance the ammonia and sludge removal processes. The plant serves the City of Oneonta, the Town of Oneonta and accepts septic tank waste from local septic haulers.

The plant operates under New York State Department of Environmental Conservation SPDES Permit #NY0031151 for the City of Oneonta, New York, and effective September 1, 2014. Steve Kruh is the Chief Operator of the plant.

The collection system consists of a combination of gravity mains, lift stations and pressure force mains. Typical for collections systems the age of Oneonta's, there are some sections that experience inflow from storm drains and roof drains and building sump pump discharge.

Planned Improvements

The City has identified areas where sanitary and storm sewer collection upgrades are needed and these are listed in the capital improvement plan. Within the economic development study area, the Market Street storm system improvement plan includes sewer separation and is slated for 2016 construction. Academy Street, Watkins Avenue, Grove Street, and Fairview Street are identified for storm system improvements in 2017 and 2018. These improvements are likely to address the sewer separation needs for this area. The Market Street sewer lift station is being studied to determine capacity. Improvements may be needed if the tributary area experiences an increase in wastewater flows. In discussions with the City Engineer, it is clear that the City has a good understanding of the wastewater collection and treatment system condition and needs. The current capital improvement plan should continue to be implemented and additional sources of funding pursued to upgrade the wastewater collection and treatment system both for improving capacity and eliminating inflow and infiltration to the sanitary sewer.

D. Stormwater Management

Existing Conditions

The storm drainage collection system is typical of others around the age of Oneonta's. During heavy rainfall events, some areas experience localized flooding, particularly in the Silver Creek catchment area.

Planned Improvements

The City is currently in the design and construction phase of a stormwater separation project on Market Street within the study area. In addition to improvements to the street collection system, a comprehensive study is needed to determine how best to correct deficiencies in the Silver Creek drainage area. Over the years, Silver Creek has been channelized and culverts have been installed without regard to overall downstream impacts. Grant funding should be pursued to study this issue.

E. Streets and Roadways

Existing Conditions

The Study Area roadway system is currently comprised of asphalt paved streets in an intersecting, grid pattern that is typical for a compact urban center of this size and heritage. Some curvature exists as a means to traverse sloping topography or to accommodate the historic lot development pattern of other manmade features (i.e. the historic railway to the south of the Study Area). The streets are generally in good condition – however, planned improvements to street surfaces experiencing deterioration are noted below.

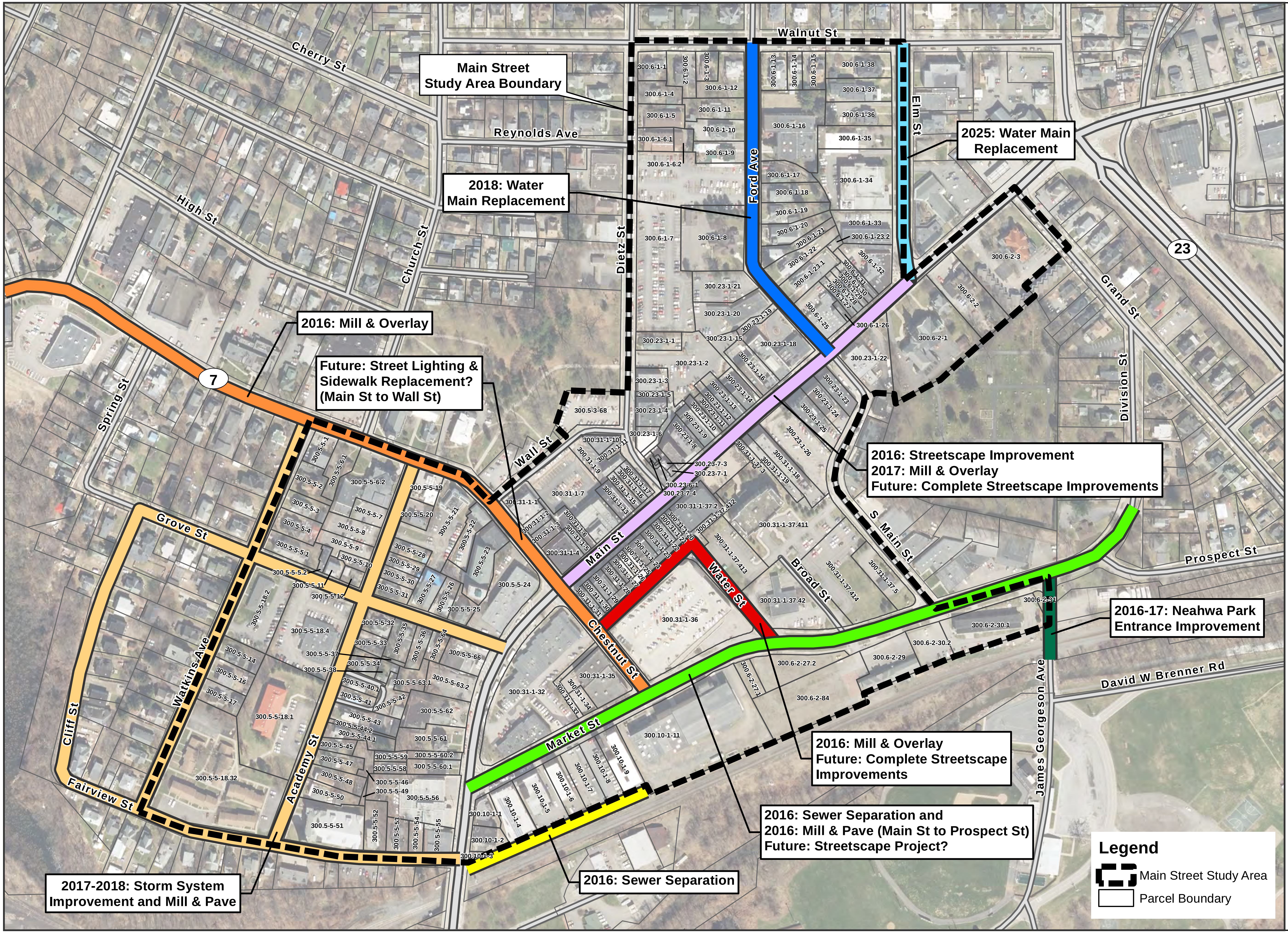
Planned Improvements

The City Engineer has developed a conditions report on City owned streets, roads and parking lots. Based on the conditions identified in the report, a priority list of the most urgently needed repairs or reconstructions should be developed and funding sources identified to bring these projects to fruition. Some streets may need full depth reconstruction while other could be milled down and a fresh asphalt overlay applied.

The City provided a list of potential future projects which may be addressed within the City capital plan. See Map 5 for an illustrative map of the following projects:

- 2016-Market St storm system improvement including sewer separation
- 2016-17-Neahwa Park Entrance Improvement (James Georgeson Avenue)
- 2016-Westcott Lot resurfacing

- 2016-Chestnut Street mill and overlay
- Future-Main Street Streetscape Improvements
- 2017-Main Street from Chestnut to Elm Street mill and overlay
- Future-Chestnut Street from Main to Wall Street, street lighting and sidewalk replacement
- Future-Complete streetscape improvements Water Street from Market to Chestnut
- 2016-Mill and overlay Water Street from Market to Chestnut
- Future-Streetscape improvements on Market Street
- 2018-Ford Avenue water main replacement
- 2017-2018 – Academy Street, Watkins Avenue, Grove Street, Cliff Street, Fairview Street storm system improvements, mill and overlay
- 2025-Elm Street water main replacement



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City of Oneonta - Focus on the Future of Main Street:
Economic Development Planning Study

Title
Map #5 - Planned Infrastructure Improvement Projects

1 inch = 250 feet
0 125 250
Feet

Project: 201567
Date: 04/22/2016

F. Private Utilities (natural gas, electric and communications)

Natural gas and electric power distribution and services are provided by the New York State Electric and Gas Corporation (NYSEG). The local NYSEG office is at 65 Country Club Rd Oneonta, NY 13820. The telephone number is 607-431-9122.

Verizon provides telephone and internet services to the Oneonta area. Time Warner Cable provides cable TV and internet services to the Oneonta area.

G. Parking

The downtown area of the City of Oneonta plays a significant role not only in the local economy but also to the pride of the local residents as they strive to keep this area vibrant as the recognized center for goods and services. Parking is a significant factor in the economic viability of the City of Oneonta as in all cities. However, it is even more significant in Oneonta because the majority of consumers do not reside within the city limits. In order to access the goods and services provided in the downtown area, parking must remain available and within close proximity to the goods and services consumers are seeking. In a parking study performed in 2002 by Transportation Concepts they note “parking lots should be located no more than a 4-minute walk from a parker’s destination.”

The parking situation that was analyzed for this study contains street-side parking, 3 public surface parking lots, and a three-level public parking structure. The public surface parking lots consist of the Westcott Parking Lot, Dietz Street Lot, and the Wall Street Lot. The three-level public parking structure is referred to as the Oneonta Municipal Parking Garage.

<u>Street-Side Parking</u>
Street side parking is available throughout many of the streets located within the Downtown Oneonta region. The streets that were analyzed for this study include Main St., Academy St., Fairview St., Market St., Chestnut St., Wall St., Dietz St., Walnut St., Elm St., Ford Ave., and South Main St.

The city of Oneonta downtown region is centered on Main Street. Main St. provides consumers with shopping opportunities, banking, dining, nightlife, and a variety of other activities. Thus, it is the primary destination for many of the vehicles attempting to park in downtown Oneonta. Main St. offers users 70 parking spaces, the majority of which are located along the north side of the road. Throughout much of Main St. parking is posted as one hour parking with no parking available between the hours of 2:00 AM and 6:00 AM, Main St. parking appears to be operating at approximately 90% capacity throughout normal business hours.

Academy Street is located in the southwest corner of the Oneonta downtown economic region and is predominantly a residential street. Academy St. offers 29 parking spaces on its east side. Parking in these spaces is primarily unrestricted except that no long term parking is allowed.

Fairview Street is the southernmost street located in the Oneonta downtown economic region. Fairview Street runs east to west and allows parking for 19 vehicles. Parking along Fairview is only permitted along the north side. These parking spaces are unrestricted.

Market Street is located to the east of the southern end of Main St. Market St. is a commercial street that only permits parking between Main St. and Chestnut St. Market St. provides 20 parking spaces many of which are posted for 1-hour parking.

Chestnut Street is largely a commercial street offering 17 parking spaces between Academy St. and Market St. The parking throughout this portion of Chestnut St. is posted as 1-hour parking. The parking throughout this street appears to operate at approximately 50% of its capacity.

Wall Street is a short street connecting Chestnut St. and Dietz St. The Wall St. surface parking lot is located at the corner of Wall St. and Dietz St. There is a private surface parking lot owned by NBT Bank located at the corner of Wall St. and Chestnut St. Wall St. allows parking for 6 vehicles located in a curb bump-out along the east side. These spaces appear to operate at 100% capacity with additional vehicles parking illegally at the end of the bump-out. There is another private surface parking lot located along the east side of Wall St. adjacent to the curb bump-out.

Dietz Street runs north and south connecting Walnut St. to Main St. The Dietz St. surface parking lot is located along the east side of the street and connects to Ford Ave. Dietz St. allows parking for 20 vehicles along its east side. The parking along Dietz St. is unrestricted.

Ford Avenue is a predominantly commercial street that runs parallel to Dietz St. north and south connecting Walnut St. to Main St. Ford Ave. provides street-side parking for 27 vehicles along both the east and west sides. Ford Ave. provides another access point to the Dietz St. parking lot.

Elm Street is another commercial street that runs parallel to Dietz St. and Ford Ave. connection Walnut St. to Main St. Elm St. is the northwest boundary for the Oneonta Downtown Economic District and provides street-side parking for 40 vehicles along both the east and west sides of the road. Elm Street parking appears to operate at approximately 75% of its capacity during normal business hours.

The final road providing street-side parking in the Oneonta Downtown Economic District is South Main Street. S. Main St. is the southwest border of the economic district and provides 17 parking spaces. S. Main St. connects Market St. to the south with Main St. at the intersection of Main St. and Ford Ave. The parking along S. Main St. appears to operate at capacity near the intersection with Main St. while operating at 0% capacity at the south end of the street.

Table31
Summary of Study Area Street-Side Parking

Street	Parking Spaces	Approximate Capacity
Main St.	*70*	*90%*
Academy St.	*29*	*50%*
Fairview St.	*19*	*50%*
Market St.	*20*	*75%*
Chestnut St.	*17*	*75%*
Wall St.	*6*	*100%*
Dietz St.	*20*	*75%*
Ford Ave.	*27*	*75%*
Elm St.	*40*	*75%*
Walnut St.	*30*	*50%*
S. Main St.	*17*	*25%*

Public Parking Lots
Parking throughout the city's public parking lots is typically posted in one of three different designations. These parking designations are:

1.) 2-HR PARKING 7 AM – 8 PM MONDAY-SUNDAY
Parking is permitted for up to two hours between 7 AM and 8 PM and is designed for downtown shoppers, dining, banking, and short professional appointments. After 6:01PM, cars can be parked in these spaces overnight until 9:00 AM in the morning and then they must be moved.

2.) 4-HR PARKING 6 AM – 8 PM
Parking is permitted for up to 4 hours from 6:00 AM to 8:00 PM and is designed for downtown workers, downtown shoppers, appointments, meals, and combination visits. After 4:01 PM cars may be parked overnight in these spaces until 10:00 AM the next morning.

3.) NO PARKING 5 AM – 6 AM
Parking is intended for all day workers downtown. These spaces must be vacated for cleaning from 5:00 AM to 6:00 AM, and then reopen for morning coffee stops and downtown daytime workers. Cars left at night must be moved by 5 AM or they may be ticketed and/or towed.

Surface Lot Parking
The Westcott Parking Lot is an asphalt surface lot that contains 52 parking spaces. The parking lot vehicular access is located along South Main St. The lot is bounded by Main St. to the northwest. The lot is situated such that is approximately 10 ft. below the finished grade of Main St. Thus, a staircase is located along the northwest corner of the lot allowing pedestrian access to the south side of Main St. The asphalt surface of the Westcott Parking Lot pavement surface is deteriorated such that there is significant fatigue cracking and several areas where the pavement surface is raveling with potholing. Fatigue or crocodile cracking is characterized by interconnecting or interlaced cracking in the asphalt layer. Raveling is defined as the progressive disintegration of a hot-mix asphalt layer from the surface downward as a result of the dislodgement of aggregate particles. The deterioration evident is likely the result of sub-base failure due to poor drainage conditions. The pavement striping within the Westcott

Lot was in satisfactory condition at the time of inspection. The parking lot is posted for 2-hour parking between the hours of 8 AM and 6 PM, Monday through Saturday. The lot is typically experiencing 90% capacity during normal business hours.

The Dietz Street Parking Lot is an asphalt surface lot that contains 278 parking spaces. The lot is accessed via Dietz St. to the west as well as Ford Ave. to the east. The asphalt pavement is in good condition with minor cracking of the pavement surface. The majority of the cracks are properly sealed to prevent further deterioration. The striping of the asphalt parking lot is in satisfactory condition with all delineator lines and traffic flow arrows visible. The parking lot is typically operating at approximately 90% of its maximum capacity. The Dietz St. Lot has two different parking designations. The area located to the south closest to Main St. consists of 2-hour parking between 8 AM and 6 PM, Monday to Saturday, with some 8-hour parking spaces available. This area is near its maximum capacity throughout much of normal business hours. The northern portion of the parking lot is posted as 4-hour parking between 8 AM and 6 PM, Monday to Saturday. This portion of the parking lot appears to operate between 50% and 75% of maximum capacity throughout normal business hours.

The Wall Street Parking Lot is an asphalt surface lot that contains 45 parking spaces. This parking lot is located on Wall Street between Chestnut and Dietz streets. The asphalt surface of the Wall St. lot is in satisfactory condition with no significant deficiencies. The striping of the asphalt lot is in good conditions with all delineator lines visible. The directional arrows on the asphalt surface were worn through and barely visible at the time in inspection. The lot is posted for 2-hour parking between the hours of 8 AM and 6 PM, Monday through Saturday. The Wall Street parking lot operates at greater than 90% capacity throughout normal business hours.

<u>Parking Structure</u>
The Oneonta Municipal Parking Garage is a three-story parking structure that consumes the entire block bounded by Water and Market Streets to the north and south respectively. The garage is bounded by Chestnut St. Ext. to the east and Broad St. to the west. The parking structure is 3-stories and contains 480 parking spaces.

The top level of the parking structure is posted for two different types of parking. The first is all day parking with no parking between the hours of 5 AM and 6 AM, all days. The second area is posted for 4-hour parking between the hours of 6 AM and 8 PM. There is no parking in any portion of the top level between midnight Sunday through 6 AM Monday morning. The top level of the parking structure operates at approximately 80% capacity throughout normal business hours.

The middle level of the parking structure is posted the same as the top level of the parking structure with two different areas of parking. The first area on the middle level is posted for all day parking with no parking between the hours of 5 AM and 6 AM, all days. The remainder of the middle level is posted for 4-hour parking between the hours of 6 AM and 8 PM. There is no parking allowed on the middle level between midnight Wednesday and 6 AM Thursday. The middle level of the parking structure operates at approximately 50% capacity throughout normal business hours.

The bottom level of the parking structure is posted differently than the middle and top levels.
The bottom level of the parking structure allows 8-hr parking between 6 AM and 8 PM, Monday through Saturday. There is no parking allowed on the bottom level from midnight Monday through 6 AM Tuesday.

Public Parking Lot Summary

Table 32
Summary of Parking Lot Utilization

Parking Lot	Parking Spaces	Approximate Capacity
Westcott	*52*	*90%*
Dietz St.	*278*	*90%*
Wall St.	*45*	*90%*
Parking Garage	*480*	*50%*

Parking Structure Existing Condition
The Oneonta Municipal Parking Garage is a three-story, steel-frame with concrete deck parking structure. The structure was briefly examined for its structural adequacy to determine if it is nearing the end of its useful life. The inspection was performed by Mr. Jason T. Ciurzynski, P.E. of Foit-Albert Associates on Thursday, October 17, 2015. The weather at the time of inspection was 58 degrees and mostly sunny. The inspection was performed from approximately 10 AM to 3 PM and began on the top level of the structure and then proceeded to the middle and bottom levels.

Top Level

The top level of the structure is open-aired with a steel rail surrounding the perimeter of the structure. The top level of the structure is accessed via a ramp from Water St. The exit for the top level is located near southern corner of the lot that brings traffic to the middle level. A decorative metal skirting is attached to the structure’s façade as well as the steel rail support posts. The steel rail surrounding the top level of the parking structure has a height that is below typical standards. The top of the steel railing is 18 inches above the concrete walk that runs adjacent to the rail. The typical standard dimension as described by the New York State Department of Transportation for this layout should be 31 inches to the top of the railing. The decorative skirting also is supported by a steel angle at the top of the steel posts. This angle and the decorative skirting provide fall protection along the pedestrian walk. The steel railing and decorative skirting are in stable condition. There are several areas throughout the railing and skirting where the paint coating has deteriorated such that substantial rusting has developed.
No noteworthy section loss of the steel post, steel railing, or decorative skirting was observed at the time of inspection.

The concrete curb and walk surrounding the perimeter of the top level is generally in stable condition with no noteworthy deterioration observed. The top level of the parking structure also has raised concrete islands that separate the rows of parking spaces from one another. The concrete curbing has been painted yellow to provide a visible delineator between the concrete deck surface and the concrete walks. The delineator paint is in stable condition with no areas of significant deterioration evident. There are several light standards located throughout the top level of the parking structure. The light standards are supported by circular concrete foundations that extend approximately 30 inches above the concrete walk. The concrete foundations are in good condition with no noteworthy deficiencies.

The deck of the top level of the parking structure is concrete with stay-in-place, corrugated metal forms. The top level deck is in good condition with only minor hairline cracks evident. There are 4 expansion joint locations in the concrete deck. These joint locations appear to be in stable condition.

There are several locations in which joint sealants were missing from the joint thus allowing water to penetrate the concrete deck joint. The corrugated metal deck forms are visible overhead from the middle level of the parking structure. The majority of the corrugated metal forms are in good condition with no noteworthy deficiencies evident. There is significant rusting of the metal decking adjacent to the expansion joints. Additional corrugated metal panels were installed below the joint in an effort to prevent water and spalled material from falling on pedestrians below. The areas directly below the expansion joints demonstrate deterioration that can be explained by the lack of joint filler material above allowing water to infiltrate the joint. The existing striping throughout the top level of the parking structure is in good condition.

The steel girders and columns supporting the top level of the parking structure are also visible from the middle level. The steel girders and columns are W-shapes of varying sizes. The steel support members have a paint coating that is generally in good condition. There are some locations in which the paint coating has deteriorated and surface rust has formed. There is no apparent section loss in these areas.

Middle Level

The middle level of the parking structure is of similar construction to the top level. Vehicles enter and exit the middle level of the parking structure via Water St. There is also an entrance to the middle level of the parking structure through a ramp from the top level. Thus, all traffic exiting the top level must pass through the middle level and exit using the Water St. exit.

The perimeter of the middle level has two wall types. The first is the same as the top level and consists of a steel rail. A decorative metal skirting is attached to the structure's façade as well as the steel rail support posts. The steel rail surrounding the top level of the parking structure has a height that is below typical standards. The top of the steel railing is 18 inches above the concrete walk that runs adjacent to the rail. The typical standard dimension as described by the New York State Department of Transportation for this layout should be 31 inches to the top of the railing. The decorative skirting also is supported by a steel angle at the top of the steel posts. This angle and the decorative skirting provide fall protection along the pedestrian walk. The steel railing is and decorative skirting is in stable condition. There are several areas throughout the railing and skirting where the paint coating has deteriorated such that minor surface rust has developed. No noteworthy section loss of the steel post, steel railing, or decorative skirting was observed at the time of inspection. The second wall type that is on the perimeter of the middle level consists of a 2 ft. high concrete parapet wall with an ornamental metal railing mounted on top of the parapet. The parapet wall is intended to prevent vehicles from driving off the middle level of the structure with the ornamental fence intended to provide pedestrian fall protection. The concrete parapet wall is in good condition with no excessive spalling or delamination visible. The ornamental railing is also in good condition with no noteworthy deterioration. As with the top level, the perimeters of the middle level contains a concrete curb and walk both of which are in good condition with no significant deterioration. The rows of parking spaces are separated by raised concrete curb and walk. The top level support columns are located within these concrete walks.
The concrete curb and walk islands are in good condition with no excessive deterioration visible.
The existing striping throughout the middle level of the parking structure is in good condition.

The deck of the middle level of the parking structure is concrete with stay-in-place, corrugated metal forms. The middle level deck is in good condition with only minor hairline cracks evident. There are 4 expansion joint locations in the concrete deck. These joint locations appear to be in stable condition. There are several locations in which joint sealants were missing from the joint thus allowing water to penetrate the concrete deck joint. Canvas fabric has been installed in all bays covering the underside of the corrugated metal deck forms. Thus, the corrugated metal deck forms are not visible overhead from the bottom level of the parking structure. There is obvious rust staining of the canvas throughout many of the bays. Many of the bays demonstrate signs of fallen debris caught in the fabric. In a conversation with Greg Mattice, P.E., an engineer with the City of Oneonta Engineering Department, he noted that the fabric was installed to prevent falling debris and water from striking pedestrians and vehicles.

The steel girders and columns supporting the middle level of the parking structure are also visible from the bottom level. The steel girders and columns are W-shapes of varying sizes. The steel support members have a paint coating that is generally in good condition. There are some locations in which the paint coating has deteriorated and surface rust has formed. There is no apparent section loss in these areas.

Bottom Level

The bottom level of the parking structure is concrete slab on grade. Vehicles enter and exit the bottom level of the parking structure via Market St. The northeastern half of the parking structure is below existing grade.

The perimeter walls throughout this half of the structure are concrete masonry unit (CMU) walls.
The remainder of the perimeter contains a steel railing with an additional decorative steel pedestrian railing located behind it. The steel vehicular railing is approximately 21 inches above the concrete walk that runs adjacent to the rail. The typical standard dimension as described by the New York State Department of Transportation for this layout should be 31 inches to the top of the railing. The steel vehicular and pedestrian railing is in stable condition. There are several areas throughout the vehicular railing where the paint coating has deteriorated such that minor surface rust has developed.
No noteworthy section loss was observed. As with the top and middle levels, the perimeters of the bottom level contains a concrete curb and walk both of which are in good condition with no significant deterioration. The rows of parking spaces are separated by raised concrete curb and walk. The middle level support columns are located within these concrete walks. The concrete curb and walk islands are in good condition with no excessive deterioration visible. The concrete slab throughout the bottom level of the parking structure is in good condition with only minor hairline cracks evident. The existing striping throughout the bottom level of the parking structure is in good condition.

Staircase

There are concrete masonry unit enclosures located at the east side of the northern corner and the west side of the south corner of the structure. The northern enclosure houses a concrete staircase and an elevator connecting the various levels of the structure. The staircase is in stable condition with no significant deterioration present. The elevator is non-operational and the doors have been welded closed, therefore it was not inspected. The top level of this enclosure adjoins the top level of the parking structure and the covered pedestrian walkway.

The concrete masonry enclosure located at the southern corner of the structure houses another concrete staircase connecting the various levels of the parking structure. This staircase is in stable condition with no noteworthy deterioration present at the time of inspection.

There is also an open-aired steel staircase located at the west corner of the parking structure that connects the various levels of the structure. This staircase is in stable condition with only minor surface rust present at the time of inspection.

Pedestrian Walkway

There is a covered pedestrian walkway that connects the top level of the parking structure with Main St. The covered walkway crosses over Water Street Extension and adjoins to the rear of an existing building located along Main St. Pedestrians then pass through the existing building and exit to Main St.
The pedestrian walkway consists of timber trusses with the bottom chord supporting timber floor beams and decking with a concrete topping. The timber trusses appear to have been recently painted and are in good condition with no noteworthy deficiencies. The steel gusset plates connecting the truss members also appear to have been recently painted with no visible deficiencies at the time of inspection. The timber floor beams and decking also have been recently painted and are in good condition. The concrete topping shows no signs of deterioration. The top chord of the structure supports a steel roof that is in good condition. The structure is supported by five concrete columns that show minimal rust staining. The staining appears to have occurred prior to the recent painting of the structure. There is no additional noteworthy deterioration of the concrete columns. There are steel railings aligning the sides of the pedestrian walkway. These railings also appear to have been painted recently and are in good condition.

Ramps

Vehicles access the top level of the structure via an ingress ramp located along Water St. The ramp begins at existing grade and extends approximately 250 ft. in length. Vehicles exit the top level of the parking structure through a ramp that runs parallel to Market St. and brings traffic to the middle level of the structure. The ramps are built of similar construction to the remainder of the structure. The ramps have a concrete deck with corrugated metal stay-in-place forms. The forms are supported by steel girders which are supported by steel columns bearing on concrete foundations. There is deterioration surrounding the joints of the egress ramp due to water infiltration such that the interior fascia member had significant section loss. The interior fascia member was replaced by an additional member added inside of the fascia member. The repair appears to be in good condition. The paint coating is deteriorated on the exterior fascia member at the same joint location such rusting of the member has occurred. The exterior fascia member is beginning to experience section loss of the top flange.
The corrugated metal deck has been encapsulated in concrete at this location. The concrete deck repair is in stable condition.

<u>Recommendation</u>
It is the opinion of Foit-Albert Associates that the Oneonta Municipal Parking Garage is in good condition for a structure that is approximately 40 years old. The structure would benefit from repairs.
In particular, the concrete deck and corrugated metal stay-in-place forms should be replaced adjacent to the expansion joint locations. It is estimated that this rehabilitation would cost $614,681 (see Appendix D for a detailed breakdown of this estimate). Ongoing routine maintenance projects include seal/replace top deck joints, repair deteriorating concrete roof, and paint block on southwest and northwest stair towers. In addition, repair/replace deteriorating drainage piping.

H. Main Street Streetscape

Introduction

In January 2014 a Downtown Main Street Streetscape Assessment was prepared by Hass Landscape Architects. The report assessed existing conditions among a variety of downtown elements including its historical/cultural fabric, the gateways at either end of Main Street, circulation patterns, parking, crosswalks, special needs and handicapped accessibility, paving, site amenities and furnishings, lighting, landscape elements, and wayfinding. The study then set forth a series of recommendations roadway paving and crosswalks, sidewalk paving, street furnishings, planters, and street trees and plantings. The study concluded with a streetscape concept plan for Main Street that extends from the intersection with Elm Street to the intersection with Chestnut Street. The plan will introduce a series of raised planters at key location along the streetscape (see Figures 16, 17, and 18.)

Figure 16 – Main Street Streetscape Perspective Rendering

Figure 17 – Rendering of curbed and raised planter at Dietz Street

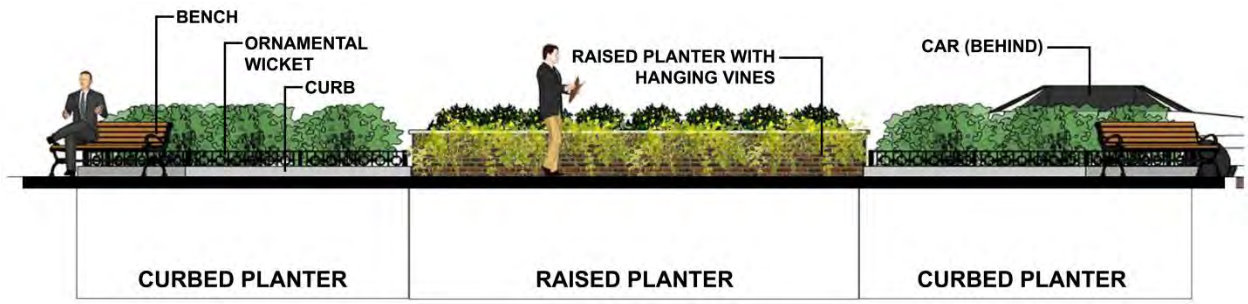

Figure 18 – Section Elevation: Raised Planter and Curbed Planters

Other improvements include renovation of the benches, new bollards, new freestanding planters, and improved wayfinding signage. The concept plan is the result of intensive review of existing conditions among the listed streetscape elements and inclusive process that included the participation of downtown streetscape committee that provided input as to the needs along Main Street and what aspects of the streetscape were working and what elements were most in need of rehabilitation.
In lieu of the available budget the committee working with the landscape architect took a prioritized approach as to what elements would be included in the project for the funds that were available. The effort focused on including those elements that would provide the highest impact for the funds that were available. The streetscape project has advanced and will begin construction in April 2016 with completion anticipated by the end of June 2016. The project will cost approximately $552,500, including contingency, and will be funded through a $400,000 Community Development Block Grant (CDBG) from New York State, approximately $117,500 in a local share from the City and approximately $35,000 from a community landscape fund. Once complete the improvements will provide complementary improvements that will address the highest priority needs of the Main Street corridor and will enhance the aesthetics of the Main Street corridor while maintaining the high degree of pedestrian and multi-modal functionality for people moving through the Main Street corridor.

Gateways

The streetscape study completed in January 2014 included a reference to gateways along Main Street and identified the Main Street and Chestnut Street intersection from the west, the Main Street and Elm Street intersection from the east, and the Main Street and Dietz Street situated more to the center of downtown as three “minor” gateways within the assessed for the Main Street study. However, the study area for this plan is broader in terms of its geographic area. Furthermore, the focus of the scope as a strategy for the future of downtown is broader, with consideration given to the regional market and the emerging trend of increased visitation downtown. Therefore, for the purposes of this plan the gateways are considered to be the James F. Lettis Highway (Route 23) accessing downtown from the interchange with Interstate Route 88 (I88) at exit 15, and Main Street at the interchange with I88 at exit 14. Exit 15 is full access interchange meaning that both east bound and west bound traffic may enter or exit I88.
Exit 14 is a limited interchange meaning only east bound traffic may exit I88 and only west bound traffic may enter I88 (see Map 6 – Downtown Interstate Access).

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City of Oneonta - Focus on the Future of Main Street: Economic Development Planning Study

Title

Map #6: Downtown Interstate Access

0 200 400
Feet

Project: 201567

Date: 04/11/2016

The East and West Gateways to Downtown

The James F. Lettis Highway (Route 23) extending northward from the interchange with I88 is a four lane, bi-directional highway separated by and raised curbed island with a guardrail. The section includes shoulders along both sides of the right-of-way. Illumination of the corridor is provided by non-ornamental roadside poles and fixtures. From a vehicular traffic standpoint the operations of the highway system function well and traffic movement is orderly and safe. The aesthetic characteristics of this entry gateway are for the most non-descript and are utilitarian with a high degree of asphalt and concrete hard surfaces. The vast amount of hard surface lends itself to low maintenance but does little to complement the aesthetics of the City's architecture and natural environment. Furthermore, the wide expanses of asphalt and concrete provide opportunity for bot only improving the landscape through the introduction of complementary landscaping but ample spaces exist for introduction of gateway and wayfinding elements that establish a sense of arrival to downtown Oneonta at both the Route 23 and lower Main Street corridors.

Recommended Improvements

It is recommended that the following improvement elements be considered for the easterly gateway to downtown Oneonta:

- The architecture of the corridor's infrastructure – lighting and wayfinding signage should be ornamental in nature with design themes that complement the infrastructure elements that exist along the Main Street streetscape and elsewhere in the downtown area.
- To the extent possible and working within established standards of the NYS Department of Transportation (DOT) for road side and right-of-way planting the high degree of hard surface areas at both gateways should be replaced by native plants and trees that are suited to roadside applications. The landscape design should emphasize the sense of arrival at the threshold to the downtown area and complement the design aesthetics established with the streetscape improvements that are currently being installed.
- The improvements to the gateway areas should incorporate elements of the NYSDOT "Complete Streets" program. According the NYSDOT "*A Complete Street is a roadway planned and designed to consider the safe, convenient access and mobility of all roadway users of all ages and abilities. This includes pedestrians, bicyclists, public transportation riders, and motorists; it includes children, the elderly, and persons with disabilities. Complete Street roadway design features include sidewalks, lane striping, bicycle lanes, paved shoulders suitable for use by bicyclists, signage, crosswalks, pedestrian control signals, bus pull-outs, curb cuts, raised crosswalks, ramps and traffic calming measures."*[13] In order to begin this process it is recommended that the City of Oneonta develop and enact a complete streets policy that will aid in the inclusion of complete street elements in these gateway corridors as well as other future transportation improvements in the City.

[13] NYS Department of Transportation – www.dot.ny.gov/programs/completestreets

VIII. THE ECONOMIC DEVELOPMENT DELIVERY SYSTEM

A. Existing Conditions

City Government
The City of Oneonta is a municipal corporation governed by a mayor and common council consisting of one member representing each of the eight (8) wards of the City. The City also has a City Manager that serves as the Chief Executive Officer and Chief Administrative overseeing the day-to-day operations of the City and its various commissions, boards and departments.

The following boards and commissions exist in the City:

- Civil Service Commission
- Library Board of Trustees
- Planning Commission
- Board of Public Service
- Parks and Recreation Commission
- Board of Assessment Review
- Zoning and Housing Board of Appeals
- Commission on Community Relations and Human Rights
- Environmental Board
- Examining Board of Electricians
- Americans with Disabilities Act Board
- Transportation Board
- Board of Ethics
- Examining Board of Plumbers

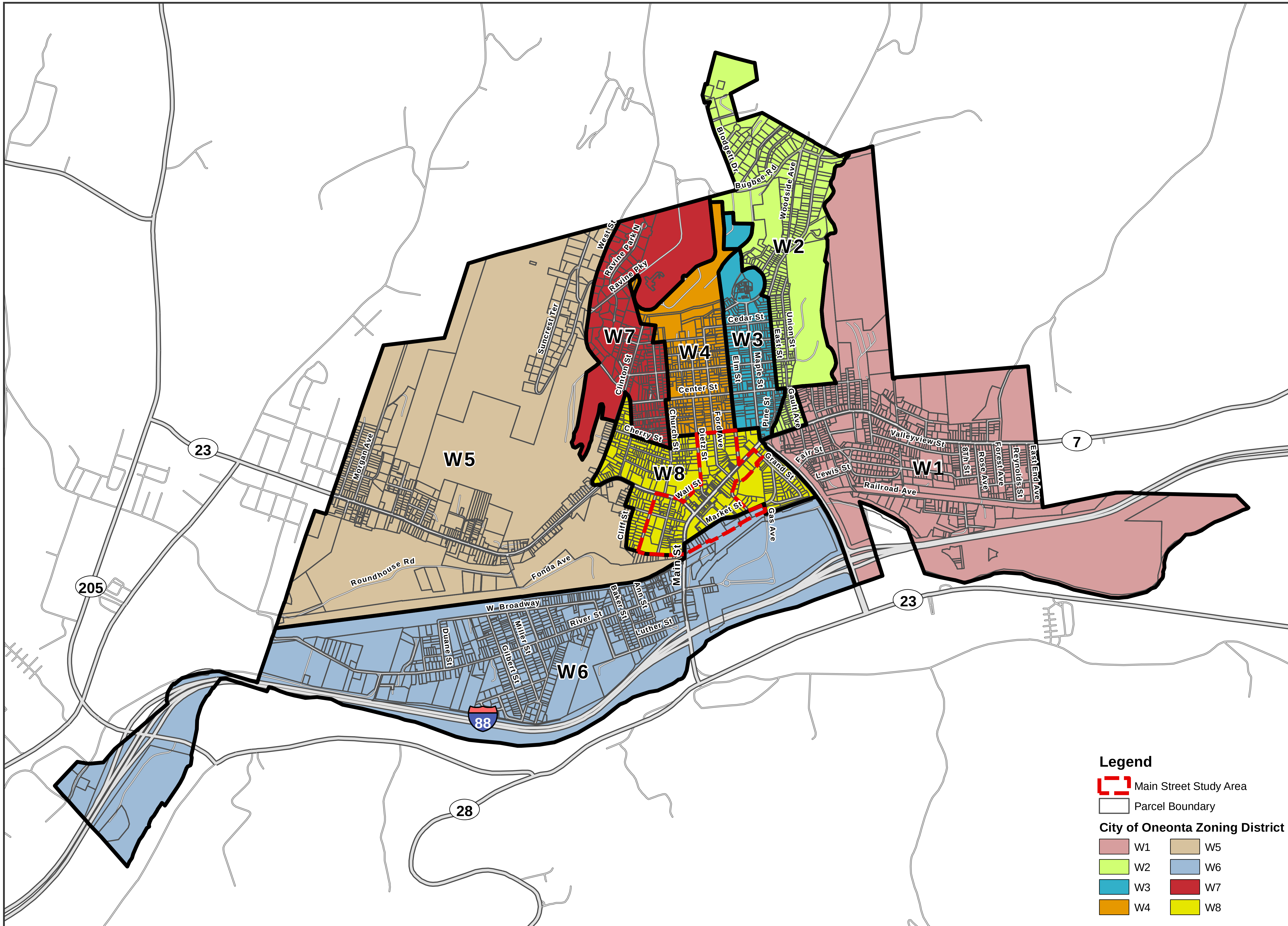
The City government is inclusive of the following departments:

- Central Garage
- City Assessor
- City Court
- City Manager
- Code Enforcement
- Community Development
- Engineering
- Finance
- Fire
- Parks and Recreation
- Personnel
- Police
- Public Service
- Public Transit
- Wastewater Treatment
- Water Treatment

Of the boards, commissions, and departments listed above the Mayor, Common Council, Planning Commission, Zoning and Housing Board of Appeals, City Manager, Code Enforcement, Community Development, and Engineering have regular interaction with activities and projects in the downtown area. The City's Code Enforcement, Engineering, Police and Fire perform regular duties and functions in downtown through administration of the vacant building registry, enforcement of the state building code and local zoning law, monitoring the conditions and functions of the public infrastructure and performing associated maintenance as necessary, and ensuring the public health and safety. However, the City's Community Development Department has the most relevance to scope of this study and setting forth a development strategy for the successful future of downtown.

The Community Development Department has regular involvement with downtown projects as the department monitors and administers grant programs that have provided funding assistance within the downtown area, the department continues to seek assistance to undertake public improvement initiatives in the downtown area (i.e. the Main Street Streetscape Improvement Project), and the staff also administers ongoing housing rehabilitation and home buyer assistance efforts.

<u>Applicable Regulations</u>
From a regulatory perspective the City of Oneonta enforces the NYS Building Code, and the City's Zoning Ordinance which also encompasses the subdivision of land, site plan review, special use permits, sign regulations and design guidelines for the mixed use zones of the code. The City Zoning Code consists of nine districts and it regulates the use and development of land throughout the City (see Map 7). The study area for this plan is predominantly zoned "Downtown Mixed Use (MU-1)" with fragments of "Gateway Mixed Use (MU-2)," "Moderate Density Residential (R-2)," and "Traditional Residential (R-4)" also occurring within the study area boundary (see Map 8).



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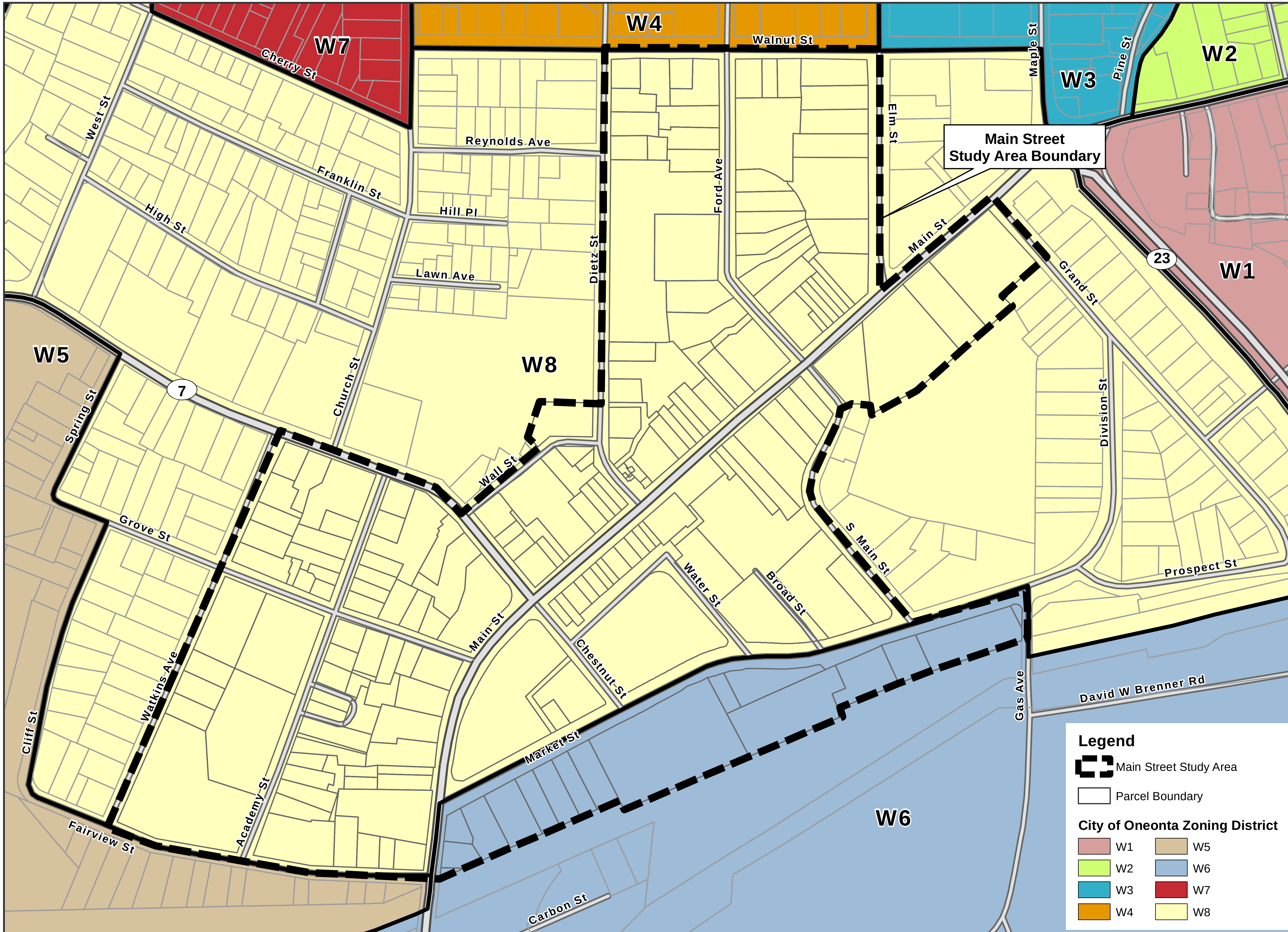
City of Oneonta - Focus on the Future of Main Street: Economic Development Planning Study

Title
Map #7 - City of Oneonta Zoning Map

0 750 1,500
Feet

Project: 201567
Date: 12/18/2015



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City of Oneonta - Focus on the Future of Main Street:
Economic Development Planning Study

Title
Map 8: Study Area Zoning Map

1 inch = 250 feet

0 125 250
Feet

Project: 201567

Date: 03/16/2016

Otsego Now

Otsego now is the County of Otsego Industrial Development Agency (the IDA) and is a non-profit public benefit agency formed under the New York State Industrial Development Agency Act (Article 18-A of NYS General Municipal Law, as amended) by establishing legislation in 1973. The Otsego IDA is governed by its Board of Directors, who is appointed by the Chair of the Otsego County Legislature. As of December 31, 2014, the IDA financial position indicated over $6 million in net assets.

The formal mission statement of Otsego Now is to: "*Assist in the enhancement and diversity of the economy of the County of Otsego (the "County") by acting in support of projects in the County that create and/or retain jobs and/or promote private sector investment utilizing the statutory powers of the Agency as set forth under the provisions of the laws of the State of New York*[14]*.*"

As a practical matter Otsego Now focuses their efforts on industrial-related development and other ancillary projects that will grow the county economy. The IDA has four staff members led by a part-time chief executive officer.

Recent notable efforts of the IDA in the City have focused on redevelopment of the railyards and development of a food hub at the site of the existing Ford Building on Market Street. The Oneonta Rail Yards Redevelopment project, at a total cost of $93.8 million, seeks to develop the former Delaware and Hudson yards in the City with newly constructed structures and transportation connections and improvements and the Upper Susquehanna Agricultural Center is a regional food hub that when completed will provide a market venue for the sale of agricultural products produced by farmers from across the region.

Destination Oneonta

Destination Oneonta has been in existence for approximately 15 years and is a non-profit member-based organization dedicated to the advancement of the local Oneonta economy through attraction of visitors to downtown Oneonta as well as the south side business district. In addition to revenue derived from member businesses and individuals, the City and Town of Oneonta have traditionally made annual contributions to the organization. The organization operates and staffs a Welcome Center at 2 Dietz Street in downtown as a venue to provide information about businesses, events and attractions in the area and promotional material as to goods and services available. The organization directly sponsors and/or supports a number of events in the downtown area including "Fabulous Fridays", financial support of the downtown Farmer's Market, the "OH-Fest", the "City of the Hills Arts Festival", Oneonta First Night, the Holiday Parade, and the Tree Lighting event. The organization's marketing efforts for downtown are primarily supported through their webpage.[15] The webpage provides information on arts, entertainment, retail, services, food and drink, lodging, health and beauty, commerce, and sports and leisure outlets/activities/vendors in the greater Oneonta area.

Otsego County Chamber of Commerce (OCCC)

The mission of the Otsego County Chamber of Commerce is as follows: "*To continually improve the overall business climate in the region; to strive for an atmosphere which attracts investment; to build a positive, forward-thinking business community; and to partner with government, groups, individuals and institutions*." The Chamber supports member businesses, offering business advocacy, putting businesses out in front of the public through networking opportunities, special events, and through the Chamber's website. The website includes links to a business directory, member discounts, news and events, programs regarding "*Leadership*

[14] Otsego Now webpage: www.otsegonow.com
[15] Oneonta website: www.destinationoneonta.com

Otsego" and "*Tri-County Young Professionals*", economic development, and a business resource center. Member businesses are further assisted through educational programs regarding business management.

Summary of City Government Financial Data

A review of financial data for the City of Oneonta as listed by the NYS Comptroller's Office was conducted for the years 2010 through 2014 (see Table 33 City of Oneonta Financial Data – Total Annual Debt and Expenditures for 2010-2014 and Table 34 City of Oneonta Financial Data – Total Annual Revenues for 2010-2014). It should be noted that this is the most recently available data from the Comptroller's Office as the publication of this data typically lags by approximately two years. The five year period as noted was reviewed as a means to report the most currently available data relating to expenditures and revenues and identify noteworthy trends. The reason for this review is to provide some insight into the financial resources available to support downtown revitalization strategies.

Table 33 City of Oneonta Financial Data 2010-2014

Fiscal Year		DEBT: Full Value	DEBT: Total Debt Outstanding at End of FY	EXPENDITURES: General Government	EXPENDITURES: Other Expenditures	EXPENDITURES: Total Expenditures	EXPENDITURES: Other Uses	EXPENDITURES: Total Expenditures and Other Uses
2010		$517,067,155	$8,745,000	$3,125,931	$17,551,572	$20,677,503	$520,753	**$21,198,256**
2011		$476,031,039	$8,160,000	$3,515,538	$20,285,082	$23,800,620	$1,739,372	**$25,539,992**
	2010-2011 '% Change	-7.9%	-6.7%	12.5%	15.6%	15.1%	234.0%	20.5%
2012		$452,605,516	$11,070,000	$5,259,301	$24,503,555	$29,762,857	$1,654,698	**$31,417,555**
	2012-2013 '% Change	-4.9%	35.7%	49.6%	20.8%	25.1%	-4.9%	23.0%
2013		$409,730,542	$15,944,599	$3,275,124	$22,983,033	$26,258,157	$2,429,270	**$28,687,427**
	2012-2013 '% Change	-9.5%	44.0%	-37.7%	-6.2%	-11.8%	46.8%	-8.7%
2014		$431,905,247	$15,083,792	$3,148,660	$20,919,209	$24,067,868	$1,854,513	**$25,922,382**
	2013-2014 '% Change	5.4%	-5.4%	-3.9%	-9.0%	-8.3%	-23.7%	-9.6%
	2010-2014 % Change	**-16.5%**	**72.5%**	**0.7%**	**19.2%**	**16.4%**	**256.1%**	**22.3%**
	Avg. Annual Rate	**-3.3%**	**14.5%**	**0.1%**	**3.8%**	**3.3%**	**51.2%**	**4.5%**

Table 34 City of Oneonta Financial Data – Total Annual Revenues for 2010-2014

		REVENUES											
Fiscal Year		**Real Property Taxes and Assess**	**Real Prop. Tax and Assess % of Local Rev**	**Sales and Use Tax**	**Sales and Use Tax % of Local Rev.**	**Other Local Revenues**	**Local Revenues**	**State Aid**	**Federal Aid**	**Total Revenues**	**Proceeds Of Debt**	**Other Sources**	**Total Revenues and Other Sources**
2010		$4,564,343	28.6%	$3,972,438	24.9%	$7,448,136	$15,984,917	$4,170,181	$1,076,896	$21,231,994	$2,605,000	$520,753	**$24,357,747**
2011		$4,668,230	27.0%	$4,166,068	24.1%	$8,468,033	$17,302,331	$3,867,407	$1,142,339	$22,312,077	$0	$1,739,372	**$24,051,449**
	2010-2011 '% Change	2.3%		4.9%		13.7%	8.2%	-7.3%	6.1%	5.1%	-100.0%	234.0%	-1.3%
2012		$4,753,684	26.7%	$4,234,577	23.8%	$8,832,817	$17,821,078	$4,589,092	$790,295	$23,200,465	$4,477,630	$1,654,698	**$29,332,793**
	2012-2013 '% Change	1.8%		1.6%		4.3%	3.0%	18.7%	-30.8%	4.0%	#DIV/0!	-4.9%	22.0%
2013		$4,847,770	26.7%	$4,243,484	23.4%	$9,031,425	$18,122,680	$5,464,125	$206,600	$23,793,405	$6,025,000	$2,429,270	**$32,247,675**
	2012-2013 '% Change	2.0%		0.2%		2.2%	1.7%	19.1%	-73.9%	2.6%	34.6%	46.8%	9.9%
2014		$4,923,598	25.9%	$4,408,209	23.2%	$9,677,342	$19,009,149	$3,772,478	$668,102	$23,449,729	$0	$1,854,513	**$25,304,243**
	2013-2014 '% Change	1.6%		3.9%		7.2%	4.9%	-31.0%	223.4%	-1.4%	-100.0%	-23.7%	-21.5%
	2010-2014 % Change	**7.9%**		**11.0%**		**29.9%**	**18.9%**	**-9.5%**	**-38.0%**	**10.4%**	**-100.0%**	**256.1%**	**3.9%**
	Avg. Annual Rate	**1.6%**		**2.2%**		**6.0%**	**3.8%**	**-1.9%**	**-7.6%**	**2.1%**	**-20.0%**	**51.2%**	**0.8%**

Source: NYS Comptroller – Financial Data for Local Governments: http://www.osc.state.ny.us/localgov/datanstat/findata

Noteworthy Items/Trends from Financial Data:

- Full valuations of properties in the City declined by over $85 million or 16.5% – The decline in full valuation is concerning as typically real property is an appreciating asset that increases in value over time. Additionally, valuation and the property tax rate are the two basic factors that determine revenue from real property taxes – a principle source of revenue to the City budget. Continued decline in valuation will place additional stress on the real property tax rate if the level of revenue from this source is to maintain or keep pace with the rate of inflation.
- Total outstanding debt increased by 72.5% or at an annual average rate of 14.5% – Increase in debt is outpacing increases in revenue – a difficult circumstance to manage should this trend continue.
- General government expenses have risen by 0.7% or approximately 0.1% per year – This rate of increase is equivalent to the annual average rate of inflation for the same period (0.018% per year[16]).
- Total expenditures have risen by 16.4% while total revenue less proceeds of debt and other resources has risen by 10.4% – The rate of increase in total expenditures is outpaced the rate of increase in revenues by more than 50%.
- Revenue from real property taxes and assessments has risen by 7.9% or at annual average rate of 1.6% – The annual rate of increase in real property tax revenue and assessments is modest and reasonable when compared to the annual average rate of increase in all wages (private and public employment) in Otsego County for the same period of 1.48% per year.
- Revenue from sales and use tax has risen by 11% or at annual average rate of 2.2% – The annual rate of increase is reasonably strong in lieu of the referenced annual average rate of increase in all wages as noted above. The average annual rate of increase in sales taxes and wages is an indicator of growing local economy.

Summary Observations of the Economic Development Delivery System

The economic development delivery system for the downtown area is somewhat balkanized and fragmented. Otsego County recently re-organized its tourism and economic development delivery functions, which is reportedly leading to fragmented governance, a lack of coordination, unclear roles and responsibilities when it comes to downtown within the context of economic development in the community. The historical nuances and political reality of political relations between the City of Oneonta, the Town of Oneonta, and Otsego County are far too complicated to unpack within the context of a downtown study. Nonetheless, multiple stakeholders mentioned the inability of government and private partners to get along and to build support and follow through on economic development projects. Sadly, this state of affairs is far too common in New York State, where local rivalries that run deep have perpetuated inefficient and fragmented municipal governments.

These conditions leave the downtown area without a cohesive "go-to" entity to undertake economic development services that are crucial to growing the downtown economy property valuation base. Such services which are needed include:

- Business retention services through education of best business administration practices, accounting business marketing and advertising.
- Funding assistance for capital improvement and working capital.
- New business recruitment efforts that strategically targeting those business sectors identified in the market analysis.
- Local entrepreneurial development that provides a regular means to reach out to persons interested in starting a small business that would be suitable for and could thrive in the downtown environment.

[16] US Department of Labor, Bureau of Labor Statistics – CPI Inflation Calculator for the period 2010-2014; www.bls.gov/data/inflation_calculator

- Interfacing with other entities of the economic development delivery system to maximize potential impact of crossover efforts to recruit new business and industry into the City and region, and maximize the impact of visitors coming into the region.

IX. EMERGING TRENDS, KEY ISSUES, AND OPPORTUNITES FOR GROWTH

The following section outlines emerging trends, key issues in downtown development, and opportunities for growth in downtown Oneonta. These are based on the market and economic analysis, stakeholder engagement, including focus groups and interviews with businesses, property owners, real estate brokers, and downtown residents, and a community survey.

Emerging trends in Oneonta are reflected by national trends in niche markets, such as food distribution and consumption, consumer style and fashion, cultural tastes in arts and entertainment, technology advancements, and the popularity of our national pastime, baseball.

- **Niche Markets / Targeted Uses and Businesses** – The following reviews key niche markets in which Oneonta has strength, and discusses emerging trends within the various niches.
  - **Restaurants supportive of food hub, local food movement, and culinary tourism.** The restaurant nice was reported in surveys, focus groups and market data to be an important attraction and destination driving cluster. Several stakeholders pointed to the opening of Bombers Burritos, a regional chain fast casual restaurant with a dedicated following. One question a number of stakeholders asked was whether there could be too many restaurants? The market data on supportable real estate would indicate that there is still significant room in the resident market to support restaurant expansion. Moreover, culinary tourism is a growing niche within the tourism industry for which Oneonta is well positioned, based on culinary destinations such as Brooks House of BBQ, Brewery Ommegang, the downtown farmers market, cooperative grocery, and restaurants focused on locally produced foods offering an authentic uniquely Oneonta experience.
  - **Clothing and accessories, emerging cluster should double the number of stores in category in downtown to become more of an anchor cluster like restaurants.** The clothing and accessories segment in downtown requires additional stores to create critical mass to become a true destination for clothing and accessories. Recent openings of McLaughlin's and HannieBee Lane represent additional variety to downtown clothing, which recently suffered loss of sporting goods stores. In the clothing and apparel segment, because they are destination and comparison goods, there is strength in numbers.
  - **Arts and entertainment provide good offerings now, but are challenged with underutilized public assembly space.** Despite the low number of arts and entertainment establishments, they represent a large share of the building space downtown overall, and much of it is currently underutilized. The proposed arts and entertainment district plan (current status: grant application in, waiting to hear) is an opportunity to address excess cultural space capacity in the downtown study area. Given market context of cultural tourism that is a large part of Cooperstown / regional tourism appeal and elevating cultural anchors focused on performance in Oneonta will only fulfill the cultural brand promise of the facilities in Oneonta and reinforce the arts and cultural identity in Otsego County. As a secondary use and market support for event facilities, a downtown conference center or hotel integrated with banquet space, directly connected to the performing arts center has the potential to draw more meeting and events business to the community when facilities are not being utilized for cultural performances. The additional hotel rooms in downtown will also be an

important leisure and transient business market expansion to enhance downtown spending patterns with more localized overnight visitors.

- **While not located downtown, Oneonta is a key part of Sports Tourism infrastructure serving the segment of baseball summer visitors.** As the baseball camp in Oneonta expand, along with larger baseball camps in Cooperstown, downtown will benefit due to the ancillary spending opportunities. Creating more rooms and weeklong rental opportunities downtown, and in nearby areas will only create more direct impact due to tourism downtown.

- **Downtown living is becoming more popular among two largest demographic generations, Millennials and Boomers that are in pursuit of similar housing opportunities that Downtown can offer.** Expanding upper floor market rate housing is being proven in downtown Oneonta by new development, reflective of the national trend of downtown living. However, building costs in historic rehab projects may also create challenges to renovation, reuse and infill development.
- **Rapid growth of e-commerce as a portion of retail sales are strength, weakness, opportunity, and threat (SWOT) all rolled up into one.** Today, with internet pricing engines at the touch of a button, consumers can price compare and potentially find better more affordable prices for the same product online (accounting for shipping) as is found in a store. However, unique goods found in Oneonta that reflect place-based character of businesses and local economy (e.g. Brooks House of BBQ, baseball camps and Hall of Fame, Brewery Ommegang) are positioned for success compared to mass retailers and national chain stores. E-commerce is more of a threat to large department stores, such as Macy's, big box stores such as Best Buy, and retail strip shopping centers and indoor malls that are functionally obsolete from a real estate marketability perspective when compared to downtown businesses. Chain stores offer widely available and undifferentiated products, making competition is high. National retailers have adapted to embrace e-commerce by offering next day pick up for online sales and building sales for internet only that supports overall sales growth while maintaining brick and mortar stores. Moreover, in place retail developments face evolution of retail format that favors a more traditional format that is found in Downtown Oneonta.
- **Downtown's competitive advantage lays in the activities it offers.** Relative to e-commerce is its visitor experience encompassing activities such as staying, dining, shopping, and playing for the widest variety of audience segments (i.e. residents and tourists) around the Downtown area. Downtown's differentiation and competitive advantage is its visitor experience. The local business opportunity for face to face relationship building between business owners, workers and customers that in turn can translate into better service, customer satisfaction and word of mouth among resident and tourist markets.
- **Downtown e-commerce and downtown web marketing.** These sectors should be integrated, if possible, to portray an honest portrait and accurate representation of destination information that enhances Oneonta's place based experience as local, authentic, and differentiated. E-commerce solutions for small businesses must be a component of downtown business strategy and must be scaled to available resources. A broad-based approach to e-commerce downtown would be for a central entity to facilitate front and back end e-commerce infrastructure that creates new business intelligence for downtown businesses, generates economic development, and supports downtown positioning and identity. Right now there are too many downtown websites, none of which are official and some that are evolving. Oneonta and the County governance evolution and management fragmentation reflects in fractured online marketing that may confuse the uninitiated, create redundant and disconnected databases of consumer information, and muddle the destination's identity.

- **Education economy and college life downtown**. Oneonta has opportunities for short term growth that will be in line with changes with student enrollment that are projected by the colleges. Learning centers, incubators and other shared space downtown that are co-located and/or cooperatively used by the college, local businesses and broader community will only bring more college life into downtown. There is a notable lack of college pride such as banners and colors that would befit a downtown that is well integrated with student community life. Many students are downtown residents and downtown workers. In Oneonta, like all college towns, there is a constant influx of college students, along with their friends and family that visit during time on campus. Alumni affinity and reunions stimulate long term repeat visitation and tourism. Local college employees are an important market segment for downtown living and shopping. Regardless of how many live downtown, students are the key audience and active participants in day to day downtown life, vitality, and street culture that is removed somewhat from campus. Students participate in economic activity downtown through shopping, dining, employment, recreation and entertainment. They also staff many of the businesses downtown. Every new student is a potential return visitor for life to the community. Therefore, offering a welcoming and hospitable environment and tourism infrastructure to students, friends and family will only pay long-term rewards for the downtown.
- **"De-Mallification"** – The rise of e-commerce is concurrent with de-mallification. The mall has lost dominance in retail format, ceding to open air centers and new town or new urbanist retail and mixed use where most innovative commercial and residential developments occur.
  New commercial developments are dominated by open air centers, some change development pattern from auto-oriented strip center or big box pads with large parking lots fronting the street. Newer developments, often including in name Town Center, Square, or Downtown, trying to bring back the urban development patterns of main street and urban design forms pre-dating the automobile accommodating both vehicles and pedestrians in a more amenity rich environment with sidewalks, public parks and monuments, street parking, and upper floor housing or offices, hotels or residences over ground floor retail. In short, development trends favor higher density over lower density, and many large format chain stores are opening smaller format stores in urban places.

X. VISION STATEMENT AND GOALS

Downtown Oneonta is a quintessentially classic urban center. The characteristics of the downtown which support this statement are as follows:

- A rich heritage that demonstrates a strong bond between the residents of the City and the wider region. The review of the history conducted as part of this study reveals that people from across the region have joined together as community and come to downtown to celebrate local, regional and even national events, make expressions of protest, or honor the service of local residents to the nation. They have pridefully gathered to recognize innovation and landmark local events.

Therefore, to describe the area simply as a "central business district" fails to recognize the extent of the relationship between downtown and the residents of the City. As well as the region and the role the area has played and continues to play as a symbol of the quality nature of the city, the region, and the people who live here.

- The composition of land uses downtown – since the early settlement of the region, downtown has always been the recognized location for a range of services such as governmental, medical, regional transportation connections, financial, educational, and retail-oriented.
- The geographic location of downtown within the context of the wider region is an inherent strength – Downtown Oneonta is the recognized center city of the region, and as such it holds a unique perception among the residents of the region.
- The influence of SUNY Oneonta and Hartwick College are stabilizing influences to the local and regional economy as downtown businesses and property owner's benefit from the presence of these institutions being in close proximity. The input received during the public engagements efforts indicate that the resulting student population is largely viewed as a positive influence.

However, there have been some recent occurrences that indicate some slight changes in this dynamic. The downtown area is experiencing the implementation of several projects to incorporate permanent, year-round housing on upper floors at the same time a recently completed project in the City has provided student housing at a location outside of the downtown area. These projects represent a shift from a predominance of student housing on the upper floors of downtown buildings.

Therefore, in consideration of these characteristics and the information gathered from the focus group meetings held, the numerous interviews performed and the tabulation of the survey results the following vision of downtown encompasses the overarching goals for the improvement strategy outlined in this report.

<u>The Vision for Downtown Oneonta</u>
Downtown Oneonta is a richly diverse shopping and entertainment center that is widely known for the quality of the goods and services offered in a setting that aesthetically attractive and genuinely pleasing. In achieving this well-deserved status the downtown reinforces and expands upon its uniquely held position as the true urban center for the City and the region.

The goals to attain this vision are as follows:

Downtown Businesses

- Businesses located in the downtown area offer a wide range of unique, quality goods and services that are directly responsive to the needs of patrons from across the region.
- The offering of goods and services will build upon the prime and distinguishing characteristics: quality and knowledgeable customer service.
- The variety of goods offered will take on a new dimension through the establishment of the agricultural goods market hub. Taking advantage of the City's centralized proximity to a range of agricultural producers. Downtown will host the region's first agricultural food hub as a prime outlet for the myriad of food products that are locally grown.

Arts and Entertainment

- The key element to the mix of goods and services offered in downtown is the prospect of continuing to build a diverse offering of art and entertainment. Downtown's inherent qualities of a central location, compactness, varied building stock, walkability, and accessibility, as well as the expanding dining choices is all characteristics that complement the continued growth and success of the arts and entertainment venues in the downtown area.
- The range of arts and entertainment possibilities include performing and visual arts including but not limited to theatre, cinema, music, and dance through a range of quasi-public, non-profit, and/or private venues.

Future Development

- The choices of product offerings and dining locations has continued to expand with an ever increasing mix of cuisines and dining formats.
- Future development will enrich the heritage of downtown Oneonta as evoked in the architecture of its building stock. Building façades and streetscape architecture will harmoniously evoke a unified appearance that enhances the visual experience of being downtown.

The Economic Development Delivery System

- A new local development corporation (LDC) should be formed focusing on assisting existing downtown businesses to thrive and prosper while strategically recruiting new entrepreneurs on a targeted basis. The result will be a responsive balance of goods and services that directly serve the needs of the City. The wider market area and the businesses in the downtown area now have an entity that can directly address their needs on an ongoing basis.

Gateways

- Visitor entrance to the downtown area is accomplished primarily through the gateways from exits 14 and 15 of Interstate Route 88 (I88). The improvements in these corridors should include elements of a "complete street" so that multi-modal access is provided. The aesthetic qualities of these gateways now complement the architecture of the downtown area through improved landscaping and ornamental street lighting now evoke a "sense of arrival."
- Wayfinding through the gateway corridors and along the I88 have been enhanced to welcome visitors and inform them as to where specific attractions are located.

Housing

- Upper floor locations have been transformed into permanent, year-round, market-rate housing. These provide a viable option for residents as they consider coming into the City or moving across the community to a location directly in the center of numerous shops, restaurants, entertainment venues, and service providers.
- The living conditions of the residents of the James F. Lettis Apartments have been improved as the dwellings have been replaced in-kind with new and more energy efficient dwellings.

Infrastructure

- Public parking is optimally utilized as a result of a new wayfinding program that conveniently and effectively provides information as the location and accessibility of available public parking lots. The City continues to monitor parking use to gauge future needs for added spaces.
- The City Department of Public Works continues to maintain an effective capital maintenance program that ensures infrastructure capacity keeps pace with demand throughout the downtown area.

Marketing

- The newly created LDC, the City, and Destination Oneonta worked cooperatively to update the marketing effort as a result of a review the listed options for marketing themes.
- The preferred theme is now utilized in a coordinated manner though multiple formats (bannering, signage, website, social media, and stationary) to effectively market the downtown area, the business located there, and the events held.

The realization of the vision through the fulfillment of the listed goals will position downtown Oneonta in the upcoming years as unique location where residents and visitors alike can experience “life enjoyed”.

XI. STRATEGY AND RECOMMENDATIONS

The following key issues are the favorable trends and the moderate to high priority needs in downtown Oneonta that serve to frame downtown opportunities for growth in the future.

A. Favorable Trends

- **High Occupancy on Main Street** – A “great problem” to have is high occupancy because it suggests supply and demand are either in balance or better yet reflect a demand for space that is outstripping the available supply. The demand situation downtown should mitigate property owner risk assuming a sufficient flow of businesses interested in space downtown. Property owners and rental agents indicate strong demand for space and some businesses complained of rent being too high. However, some businesses may not have adequate business plans and are unable to support increased rents downtown. Thus, providing adequate space, right-sized to business opportunities and owner-operator resources are critical to downtown growth. Turnover in undercapitalized businesses can be a challenge for downtown. Notably the Shops at Ford and Main offer smaller spaces that contribute to the incubation of small businesses that start in small spaces and “graduate” to larger spaces as demand is proven and operations can support measured growth. The Monkey Barrel toy store is an example of this phenomenon. Recruiting regional second stores like McLaughlin’s and outside regional chains that are poised for growth like Bomber’s Burritos are clear opportunities, in addition to growing existing Oneonta based businesses.
- **Riding the Niche Market Wave** – In the case of downtown Oneonta, market data indicate sales leakage in selected store categories in niche markets that are evolving locally, as well as nationally. A greater appreciation for food driven by media for experience (cooking competition shows, food tourism, and shows like “Diners Drive ins and Dives,” along with more consumer spending on food away from home has supported evolution of restaurant industry away from fast foods towards fast casual and more upscale offerings. There will always be a core set of pizza and sandwich delivery shops that offer undifferentiated quick service, the challenge for Oneonta will be to migrate more upscale restaurants to attract increased spending from students, visitors and baseball families from across the country.
- **Continue progress with existing project initiatives** - Key development opportunities that address niche markets downtown are the current area of focus. The City and OtsegoNow are pursuing opportunities together such as: a potential food hub being studied for program, feasibility and jobs impact, the proposed arts and entertainment district plan concept that could be bolstered with a pending grant application for a feasibility study, and a boutique hotel and culinary center, which is in various stages of project planning and development. Adding new commercial and residential space, particularly mixed uses on Market Street, can start to address some of the functionality and internal accessibility issues in downtown between Main and Market streets. Depending on size, configuration and pricing, downtown businesses may be interested in moving to new commercial spaces that are better suited for modern retailing than older buildings that may have higher costs and limited functionality.
- **“Behold I have set before you an open door”-** This biblical quote is appropriate because of downtowns potential functions as the gateway to Oneonta as a learning community. The City, local and regional economies are driven by their educational institutions and the downtown function as the learning communities third place, home being the first place, and work or classroom is the second. Where one meets their friends and neighbors and interacts with

community and civic life is the third place downtown. Yet you would not know, due to lack of university pride (e.g. banners in windows, street poles and limited college merchandising) on Main Street, indicating a place somewhat removed from college influence and/or presence. Therefore, creating more college learning spaces downtown—such as art studios and galleries or incubator or maker spaces—will help to build community pride, and directly support downtown growth opportunities.

B. Moderate Priority Needs

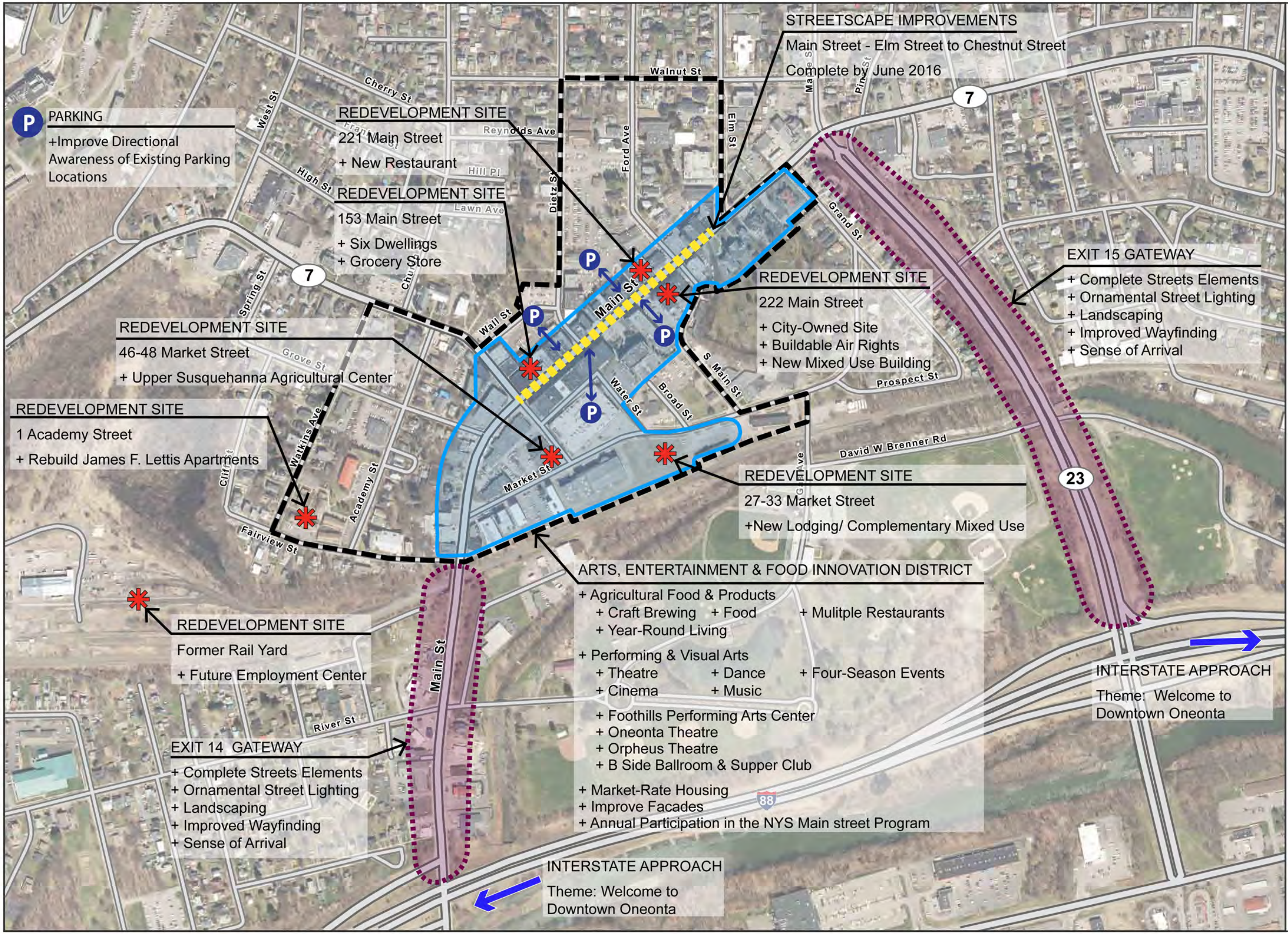
- **Limited internal accessibility -** Market Street and access points between Main Street and Market Street need to be improved with new development that supports increased utilization of the parking garage and excess parking capacity existing within the facility. Improving access between the referenced points and taking advantage of the available parking capacity will inherently make Market Street and the immediate area surrounding it more pedestrian friendly. The Main Street interior lobby and covered walkway that connect Main Street and the parking garage on Market Street is an excellent pedestrian attribute. The connection between parking garage and the lobby can be further improved by exploiting the underutilized space in the lobby to host interior markets, events or performance space for local musicians. Additional improvements to pedestrian access can be provided through enhanced access via the interior of downtown hotel. While this interior pathway is limited by being on different floors, the existing internal configuration is more of barrier than conduit. Minor changes to signage and access policies that address hotel guest and public safety issues that are satisfactory to hotel management, and increased use and access to the hotel which will only contribute to and benefit the hotel's visibility.
- **Poor functionality and experience of public space** – The need exists to create place-making through more outdoor seating, public art display, and the provision of streetscape amenities such as themed wayfinding and bike racks. These treatments are more conducive to downtown visitor satisfaction by offering a pleasant and functional visitor experience to find locations efficiently and effortlessly and increase the possibility of returning. The effort should build upon improvements that are currently being installed with the streetscape improvement project on a section of Main Street by continuing these improvements further down Main Street and along intersecting and parallel side streets.
- **Underutilized cultural performance and event space** – Market demand for cultural performance is perfectly elastic and people travel from over an hour to see performances. Overnight stays, by travelers, generate additional visitor spending in accommodations, dining, retail and services. Therefore, programming more cultural activity and performances in the City's indoor and outdoor facilities will only support additional ancillary spending downtown.
- **Lack of Employment Growth** – Historic population and employment trends indicate a relatively stable employment situation now and in the future for the region. Downtown Oneonta employment growth therefore has to come from new jobs in the community or moving jobs from other areas of the local and regional area into downtown.
- **Lower Wages** – Compared to other areas, downtown jobs offer lower wages which reflect the retail, restaurant and accommodations base that exists downtown. The expansion of retail, restaurant, accommodations, cultural and entertainment that is recommended is likely to contribute new low wages jobs. While these jobs are often filled by students, adding new higher wage office and professional service jobs will depend on the healthy mix of new commercial development and potential for growth in office workers in the future.

C. High Priority Needs

- **Downtown appearance** – The appearance of downtown areas, particularly Main Street storefronts, signage, merchandising and visibility need improvement. The new streetscape project currently underway is a good start to improving Main Street infrastructure and furnishings. Related improvements to design of façades through improved incentivized subsidies, standards and code enforcement are ways to improve appearance to make the community more attractive and welcoming. The concepts from the Streetscape Project need to be taken further by integrating with improvements, especially signage and wayfinding, throughout Oneonta at critical highway junctures and gateways to downtown. Streetscape improvement projects should contribute to placemaking with new improvements that provide infrastructure to support and complement many different place-based activities with opportunities for the spontaneous and planned events and for seasonal business expansion (e.g. outdoor seating, pop up vending).
- **Balkanization of the Economic Development Delivery System** – Otsego County recently re-organized its tourism and economic development delivery functions which is reportedly leading to fragmented administration of economic development initiatives, a lack of coordination, unclear roles and responsibilities, particularly when it comes to the downtown within the context of economic development, such as job creation, commercial expansion and overall growth of property values within the community. The historical nuances and reality of political relations between the City of Oneonta, the Town of Oneonta, and Otsego County are far too complicated to unpack within the context of a downtown market and economic analysis. Nonetheless, multiple stakeholders mentioned the inability of government and private partners to get along and to build support and follow through on economic development projects. Sadly, this state of affairs is far too common in New York State, where local rivalries that run deep have perpetuated inefficient and fragmented municipal governments. The basic need exists to provide economic development services, principally the effective execution of business recruitment program and the ongoing redevelopment of vacant or underutilized parcels and or buildings throughout the downtown area. Downtown Oneonta is not unlike a privately owned shopping center or mall. Successful private centers and malls have full-time managers who sole purpose is to keep storefront occupancy levels high and keep store sales strong and brisk through a diverse offering of goods and services. The same holds true for a downtown setting – an entity is needed in downtown Oneonta that will maintain a constant awareness of the goods and services offered and seek to fill voids among the stores and service providers as well as in the physical landscape among underserving parcels and buildings.

D. Opportunities/Strategies for Growth Downtown

The market support for consumer oriented businesses is strong in downtown Oneonta, due to high occupancy and retail and restaurant sales leakage in identified business types that create cluster development opportunities, despite stable long-term population and employment projections. Aggregate personal income is projected to grow 13 percent between 2015 and 2020 which will support commensurate growth in consumer spending potential that downtown Oneonta can tap into. Opportunities for growth in downtown Oneonta include:



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City of Oneonta - Focus on the Future of Main Street:
Economic Development Planning Study

Title
Map #9: Downtown Strategies Map

Project: 201567
Date: 04/11/2016

- **New downtown commercial and residential developments** in vacant and underutilized structures and properties that will offer new business development and market rate housing opportunities. New development has the potential to create growth opportunities for existing businesses, new homes for smaller households of professionals, empty nesters, and seniors, as well as create more attractive tourism infrastructure with new visitor hospitality and amenities, such as hotel, restaurants, retail, public assembly, event, and entertainment venues. Redevelopment, infill and new development in turn create new space for existing business growth and new business attraction from outside the City, local area, and region assuming appropriate organizational capacity Reuse developments should focus on activating upper floors of existing historic buildings that are noticeably vacant in Oneonta and have been for far too long in some instances. Persuading property owners to make investment and connect to development resources if needed will be a critical role the city can play. Infill development should focus on vacant/underutilized properties (e.g. parking lot on Main Street) and all of Market Street which currently has low density to the point where significant business activity cannot be supported. The practice of renovation, reuse and infill will foster the opportunity to reposition, repurpose and improve functionality of underutilized properties and facilities geared towards public assembly cultural programming, performances and events. Particularly those which are foundational to the region's cultural industry (e.g. Foothills, Oneonta Theater, vacant churches, etc.) should be on par with the cultural offerings in Cooperstown.
- **Improved and more centralized downtown management** is required to overcome existing governance and operational fragmentation in the current economic development delivery system in Oneonta. Downtown management entities help to promote effective, transparent and equitable partnerships for downtown operations that effect public safety, cleanliness and maintenance. These are mutually beneficial to public and private partners and support public realm improvement and more positive visitor experience. Without centralized downtown management, however, an array of partners that take on various roles and functions of a downtown manager require more clearly delineated roles, responsibilities and expectations for partners. The next step towards a more integrated downtown management is to develop a strategic action plan for downtown development that engages a broad base of public and private partners that span downtown, local and the regional economies. Following are key program areas of downtown management and identification of the organization that is primary or lead partner in each program area of downtown management:
    - **Advertising / Marketing** – Destination Oneonta is looking to expand the definition of a Main Street organization to encompass other parts of Oneonta, importantly the campuses and Southside Mall, which is a destination driver for regional residential traffic to the area. Downtown should have a reciprocal and compatible relationship with the Southside Mall because they both serve important functions in the local area regional serving nature of Oneonta. However, there are multiple websites (e.g. City website, downtownoneonta.com, mainstreetoneonta.com, destinationoneonta.com) already advertising downtown, which may create a barrier to building unified downtown marketing programs, not to mention regional websites like thisiscooperstown.com, otsegocc.com, and otsegonow.com.
    - **Downtown Events** – Destination Oneonta and other volunteer community organizations, with support from the city, sponsor and produce premier community events such as First Night Oneonta. This model appears to work as events are very popular. Like in most communities, long term sustainability of events is contingent upon perpetuating them, and can be challenging over the long term due to burn out, staff and volunteer change, and changing community demand for events. Though they can take a

lot of resources, both volunteer and financial support, downtown events were identified by all stakeholders as some of the most important activities going on downtown. Downtown events instill community pride, build cohesion, and provide reasons for residents and visitors to come to and enjoy authentic Oneonta experiences. Therefore, it is recommended that the city continue to provide financial and operating support for downtown events and work with partners to expand the calendar of community events, especially during peak seasons.

- **Technical services** and outreach to existing businesses in downtown is a core need of many small businesses. Downtown businesses have available to them a Small Business Development Center (SBDC), supported by the US Small Business Administration and operated by the University of Binghamton. The SBDC offers training and workshops in marketing, accounting, and other relevant business topics. It is co-located with the OtsegoNow and is integrated with small businesses outreach as noted in the next point.
- **Business outreach to build awareness locally and regionally is critical to growing existing businesses and recruiting new businesses.** The Chamber has the primary role of nurturing and supporting existing businesses. In that capacity they support the expansion and retention of these businesses through their programs such as Leadership Otsego and the Tri-County Young Professionals, and services offered through the Business Resource Center. The Chamber also conducts regular outreach to businesses downtown, and throughout the region, through its membership activities which support building awareness of downtown activities and business investment opportunities. Business recruitment is currently the responsibility of OtsegoNow. However, these efforts are primarily focused on industrial businesses outside of downtown Oneonta.
- **Downtown residential and commercial space finder** is an integral part of downtown marketing and keeping the pulse on business activity. Property owners and brokers are currently the primary advertisers of available space for sale and for rent. Many do this with just a sign and a phone number in the window. The current “system” reflects fragmentation as well as lack of focus on unified downtown marketing and positioning. Regularly updated and linked property, building and business databases are a hallmark of effective downtown management and a foundation for regular market analysis and updates. Such a system is currently lacking for downtown Oneonta. Implementing a robust back end database that supports a user friendly space finder integrated with downtown marketing would enable economic developers, property and business owners to know information about available space, business mix and developing plans and projects that can be more easily promoted and monitored as they progress.
  This opportunity to building a downtown property and space finder database may have broader applications. The space finder would showcase available commercial and residential space for sale and rent, and be supported by regular capture and data integration with assessor’s data, sales transactions and rental occupancy throughout downtown and broader City and County as appropriate. For this market and economic analysis, data was collected, compiled and cross referenced from multiple city, state and private partner data sources. The function needs to be institutionalized in public or private partner in Oneonta so that it need not be reinvented once in a while when a new downtown planning project comes along. It should be created as a part of a downtown management function and economic development delivery system.

It is suggested that a local economic development corporation (LDC) be formed to fulfill this role. The downtown LDC is envisioned to be a standalone, autonomous entity structured according to a corporate charter and governed by a board of directors. During one of the interviews conducted a suggestion was made as to a potential means to fund the LDC through a payment in lieu of tax (PILOT) increment financing (PIF) program. Under this approach and in partnership with Otsego Now, a PIF structure allows for the diversion of money to fund the LDC. Such an approach has the advantage of providing a regular means to fund the LDC particularly during its startup phase. Additional methods for funding include assignment of loan repayments from a Community Development Block Grant (CDBG) Economic Development Program as part of the NYS Consolidated Funding Application process which is administered on annual basis by New York State.

Regardless of its specific composition or funding method utilized, the provision of economic development entity for the sole purpose of providing economic development services downtown is the primary need identified during the interviews and focus group meetings conducted as part of the public engagement process.

- **Public space improvements** are a big opportunity to promote functional and attractive streetscape, signage and wayfinding, visitor information, parks, plazas and open spaces. The benefits of public space improvements including better accessibility to, from and within Downtown, more connectivity especially between Main and Market with new development, enhanced multi-modal transfers (e.g. vehicle, bus, bike, pedestrian, etc.) and a more pleasant and repeatable visitor experience for residents and tourists is an important consideration for improving downtown. This is largely the city's role to promote public space because they implement physical infrastructure improvements on regular basis and so it is reasonable that the City lead improvements to public spaces. Support from private partners can include businesses, community groups focused on beautification, civic pride and gardening, and well as private volunteers for downtown events and activities. A dedicated capital replacement reserve or schedule for downtown improvement replacement is an important part of the long term plan for downtown development that can be capitalized by leveraging private improvement projects. Additionally, the City should maximize participation in available funding programs through the NYS Consolidated Funding Application (CFA) process. Public space improvements should encourage use of the public realm for commercial space (e.g. seasonal sidewalk dining, parking lot infill), improving visitor accessibility, enhancing parking situation and multi-modal transfer.

Appendix A

Notes from Focus Group Meetings

ConsultEcon, Inc.

Memorandum

To: **Jim Martin, LA Group**

From: **ConsultEcon, Inc.**

Date: **October 19, 2015**

RE: **Interview Notes from October 6 Meetings**
City of Oneonta – Focus for the Future of Main Street Economic Development Planning Study

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Interview With: Meg Hungerford, Interim City Manager/Finance Director, City of Oneonta
Interviewed By: James Stevens, ConsultEcon, Inc.
Date and Time: October 6

First Topic: Economics

The economy is stable, wanting to expand

<u>Assets/advantages</u>
Peter Clark is doing good work to bring in new shops
Assume interest & drive there to make it better, not sure if $ will follow
Downtown has a lot of appeal to college students
Convenient – need more education about parking – compact, pretty, walkable.
Farmer's market on Plaza

<u>Downtown Audiences</u>
College students
people who live and work in downtown

<u>Draws</u>
restaurants draw from outside.
Oneonta draws from wide area, but not necessarily going to downtown
perceived barrier about ease of getting in/out of downtown
not sure if downtown has what people looking for…

<u>Challenges</u>
Letting people know downtown is here
messaging not consistent
not making it easy
streetscape-

Needs
grocery store, different from health store
Klugo building has new residents w/no place to shop for milk
Have entertainment venues, but theater & Foothills performing arts are struggling – both would like more activity – need to strengthen

Competition
Communities to south that have capitalized on second home owners
Bovina, Ardys, Delhi, Cooperstown
Oneonta needs to piggyback off that more

Colleges
Bring in a lot of people and their spending
Some issues related to public safety
Mutual interest – that's good for them is good for us – want attractive downtown
City struggles because tax exempt
other towns have contributions
example of Colgate contributions to Hamilton –
Colleges not responsive to inquiries
Affects housing
college students different from other markets
condition of housing
affordability due to conversion of housing from single family to apartments

Property owners
Some are forward-thinking: engage/invested
Peter Clark
John Hewitt
Bombers Burritos
looking at renovating upper floors – Chip Klug's renovation of Bresee's depart..

Second Topic: Economic Development Delivery System

Otsego County used to have economic development office on Main Street
Count disbanded office
City in transition
Not as much coordination or focus in past , but now meeting monthly w/IDA
Bill is new
Study should come up with recommendations for
- type of businesses,
- what will draw people downtown,
- what could be done better to market, support businesses

Not sure how roles should look like City is stretched thin
City has to apply for grants to make improvements.
What are the barriers that exist?

What are needs?
Not sure if City is going to work with investors & businesses to convince them to come downtown; IDA more recruitment-oriented potential
Recruitment may be a periodic effort rather than ongoing
City's efforts to marketing are supporting Destination Oneonta

Third Topic: Events

Destination Oneonta does a good job with events
Need for more, if brings more people and activity
In terms of events, don't want to drain City services
Fab Fridays have limited impact

Fourth Topic: Land Use

Upper floors are under-utilized
would be great to do more like Klugo development
Need for tourist-type uses, shops, restaurants, places to stay
Market Street has potential to be incorporated into Main Street activity
hotel study: how to link to
Vacant lot – park entrance
Market street has bigger spaces, former appliance store next to auto parts
do we need more business & professional services?
Potential food hub at vacant Ford sales warehouse
demolish potential
owned by 12 tribes group (that own Yellow Deli)

Talk to:
toy store
Printegre – professional services
Rachel Jessup
Tom Masterjohn – Red Caboose Restaurant – recently opened Dietz & Wall Wines
Bside – Bill Carrington;
Dave Zumo Latte Lounge – talked about expanding up or down.

How to balance City not being obstacle and being realistic about what City can do within resources.

Interview With: Rachel Jessup, Destination Oneonta
Interviewed By: James Stevens, ConsultEcon, Inc.
Date and Time: October 6, 2015

About Destination Oneonta (DO)
Just changed name due to changes focus on bigger picture – goal is to market Oneonta as a whole and pull in visitor into Oneonta
Two paid employees, mostly volunteers
    1 part time 20 hours office admin
    1 part time 10 hours social media, marketing
Main function is events
Second-liaison between businesses and City & Chamber
Welcome Center is new this year
Initial conversation with City about BID
Want to have a meeting to inform
    Business members
    Individual members
Trying to be sustainable
$70,000 budget – all from City

First Topic: Events

DO runs several events and provides volunteers, funds to other events and Community Arts Network

Support other events financially including First Night and Arts Festival
    First Night organization does New Year's Eve
        Balloon Festival (3,000-5,000), July 4th (10,000)
    Arts Festival
DO Events:
- O Fest
    - close Main Street
    - 5,000-6,000 people come
    - events on campuses
- Fab Fridays
    - first & third Friday April to October
    - always music first Friday
    - third Friday focused on galleries near fire station
- Annual car show
    - moving to bi-annual
    - 1,000 attendance
    - weather dependent)
- Santa Parade – before Thanksgiving
- Santa Cottage – in Muller Plaza
- Tree lighting
    - close street

house & carriage rides
gingerbread contest
thousands
new: decorating contest
ugly sweater contest
holiday open house/merchant-based)

Audience
30-mile draw for big events

Second Topic: Economics

Stable economy – would like to see more people come

Assets
Unique merchants
Restaurants
service organizations – history
Challenges
Merchants expect DO to do work – some active; some not.
Filling empty spots
some have been there for years
don't know why, but sometimes may be high rents
Frustrated because some organizations want to fill empty space but landlords won't do it – maybe formal program opportunity to work with landlords
Perception that parking is a problem – but not a problem

Needs
Key focal store like the old department store that draws more

Competition
Competition to downtown is Southside Mall
lots of brand-name stores
manager of Mall on Board DO – trying to work together more

Colleges
Colleges are huge
students are downtown
some restaurants closed during summer because they cater to students
Strides between colleges & City
both have community service organizations
Improving relationship between city and college was the thought behind O Fest

Property Owners
Peter Clark most engaged

owns a number of downtown buildings
Right above Key Bank – has been empty for 20 years
A lot of absentee landlords are not active
Klugo – active
Sophie Richardson – active – owns buildings where Simply Thai and Maxwell's are

Third Topic: Economic Development Delivery System

Economic development services are City, Jeff, Bill
Michelle Caten at Small Business Development Center
IDA
There is good coordination
wish we knew more about grants available

Main Street (MS) organization (DO precursor organization) tried doing business recruitment, but not niche
did not have expertise
never really focus on it
MS could be helpful if they knew more to direct people to resources. - Design Committee – focus on beautification/painting

Fourth Topic: Land Use

Need more retail on Main Street – lots of non-profit/services organizations on Main Street

Some uses generate undesirable people in downtown, such as addiction services

Interview With: Sandy Bathes, CEO & Elizabeth Horvath, COO, Otsego Now
Interviewed By: James Stevens, ConsultEcon, Inc.
Date and Time: October 6, 2015

<u>Otsego Now</u>
Otsego Now doesn't do Main Street, does bigger projects
Otsego Now don't want to do Main Street
- tried to and County said "No."

Market Street is focus area for IDA projects:
- Vacant site next to Foothills
    - Boutique hotel
    - Culinary/food/craft beer
        - connect to: Brewery Ommegang, Northern Eagle Beverage
- Food hub
    - received funding to do feasibility for food hub
    - 12 Tribes site
- Redevelopment of railyards
    - 150 acres
    - Just purchased by Norfolk Southern
    - Shovel-ready land sites on 75 acres
    - Warehousing, distribution, manufacturing
    - Real job creation that can drive demand for good jobs

First Topic: Economics

Economy sluggish – in danger of decline

<u>Assets/Destination</u>
Good places to eat
- Red Caboose
- Autumn
- Simply Thai
- Yellow Deli

Visually appealing and active
- Green Toad
- Latte Lounge

Plaza is positive
Bones are good; architectural attractiveness

<u>Challenges</u>
Negative vibe downtown
- empty storefronts
- student housing
- Department of Social Services 242 – addiction services – people wandering Main Street

No standards for appearance
    Green Toad good
    others bad, such as PC Store
Signage and storefront standards need to be implemented.
Sidewalk appearances need improvement
Need investment in Main Street to spur investment in Main Street
Destination Oneonta has no office hours posted
    often closed
    website lacking in information
City going through tough time – lack of leadership after former Mayor died.
Need to fill the holes
    Westcott Garage
    Plaza
    a lot of vacancy with space for redevelopment
Balance between college, tourism
Need more diversity of retail
New additions have not enhanced the downtown

<u>Audience</u>
College & workforce
Not a lot of people driving to downtown from highways
Not a lot of population living here
Other destinations in Oneonta that draw from highway
    Brooks BBQ
    Farmhouse
Most people from 45-minute ring come to Oneonta and go to Southside; retail is problematic in college towns – look at any others:
    Cortland
    Brockton
    Oswego
    New Paltz (headed in right direction)
    Hamilton-Colgate – College investment in downtown
    Ithaca College – Ithaca downtown

<u>Development Needs</u>
How to pull off 88
IDA focus on Market Street to create developments drawing off highway
Will need much more & better connections to create benefits to Main Street
Timing on projects undetermined
12-18 months to find partner, then 2017 before anything happens.

Oneonta better off because year-round economy
    Cooperstown has no shoulder season

<u>Colleges</u>

City-college relationship okay –

Not much has happened since last Mayor
More crisis reaction
Two colleges don't get along @ leadership level
Otsego Now is trying to get Hartwick and SUNY to use training center in downtown

Second Topic: Economic Development Delivery System

County-wide – no focus on small businesses
City needs leadership to drive change – not there yet
Main Street critical to attracting other businesses – downtown Oneonta has a county-wide role
Zero coordination now; need to work together on strategy

Third Topic: Other

Plan needs to be hard-hitting, not focus on optimism
Independent views from development community would be interesting
Need more controls; treat like historic district
City should do code enforcement – write tickets
Need innovative strategies to shake things up
Market Street developments can drive traffic to get to Main Street & need better connections to do it

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Interview Notes

City of Oneonta – Focus for the Future of Main Street Economic Development Planning Study

Interview With: Jeff House
Interviewed By: Jim Martin
Date and Time: Monday, October5, 2015 @ 11:00am

First Topic: Economics

Usually tailing when improvement occurs
Stable retailing in tough
More tourism
Reasonably insulated due to 2 hospitals and colleges
Jeff/wife had children's bookstore but….
Downtown had five (5) sporting goods stores-all gone now

Advantages-Having Micro Enterprise Grant
Mix of uses
1st floor/upper floors residential
More focus on
Tourism-stabilize summer season
Excellent transportation
City is proactive supporting business 50± or 100 businesses downtown

Have Small Business Development Center
SUNY with Binghamton

Threats
Shopping patterns changing
Shifting to entertainment/dining
Southside destination retailers (Walmart, Dick's)
Continued weakening of retail markets
Restaurants living off some level of patronage market is only so big

Key Draws
Restaurants
Bars
Micro Brewery
Bomber's Burrito 215-221 Main now vacant (coming)
Market rate residential

Missing Pieces/Elements-Confusing signage with DOT entry into downtown
Retail
City recruited retail

Relationship with Colleges
Chamber County Based
Offering Entrepreneur Training

Barbara Ann Heagan
Strengthening neighborhoods
Code enforcement limiting unrelated people
So many student housing apartments limiting young families
Newman Development-300 units
Resulted in some former students units going to market rate
Don't see initiatives to
- Highly interact with community
- No offsite classes

Property Owners
Mixed-attitude
Some bought at high point/tough to reinvest
Good strong core of locally owned
Overall good committed group

Second Topic: Economic Delivery System

Joe B. did it for years
Otsego Co. Dev. Corp.
- Still active
- No staff

Sandy Mathis/Bill Kerbin
Topic driven/need driven

What Works/What Has Not (Retail)
Restaurant
Market rate residential

Need better understanding of who is spending money?
Where are they spending it?
Can city tap in to it?
Tourism-might be growth element
**Luisa Montonty*
Southside mall manager
Owned business in downtown
Active promoting Oneonta region

Interview Notes

City of Oneonta – Focus for the Future of Main Street Economic Development Planning Study

Interview With: Mayor Gary Herzig
Interviewed By: Jim Martin and James Stevens
Date and Time: Monday, October5, 2015 @ 1:00pm

First Topic: Economics

The economy is stable but not adequate
Downtown better than five (5) years due to more activity
Less vacant storefronts
Boost morale-Bresses's Project was a positive psychological impact
Stevens building CFA application next door will have similar effect

Advantages
Aesthetic character, beautiful downtown
Location good off of the highway
Freight rail road
On river
Growth in tourism-primarily due to baseball
Growth in tourism due to baseball camps
- Cooperstown baseball village in Oneonta
- Dreams Park-in Cooperstown
- 100 teams/week
- 10-20 kids/team with parents who take a vacation in the area while their children are in camp

Jobs not high paying service industry, Oneonta needs better paying jobs
Housing-limited
- Some market-rate
- Very expensive rehab

Colleges
Colleges relationships are good
Colleges essential to local economy
SUNY-very community minded
Parties/loud-drinking-house parties
- College living mixed throughout community unlike in other college towns
- More problems with house parties than with bars

Need-higher paying jobs, with decent salary and benefits
Potential with RR related development, light manufacturing
Looking at Market Street opportunity with empty lot, old car lot next to Foothills performing arts center – might be multi-use, hotel
Need to connect to park because it brings in foot traffic
Estimated 300 to 2,000 attend baseball games in the stadium
Grant application in for study of entertainment district encompassing Foothills, old movie theater in downtown

Second Topic: Economic Delivery System

E.D. Delivery-no formalized package

People complain high taxes
- Colleges own many properties high exemptions
- Missing quality high paying jobs
- Rail yards-#1 priority
  - Market St.

Old building (car dealership)
Vacant lots
College baseball
Foothills performing arts
Application for study for “entertain district”
“Small hotel”
Mixed-use building

E.D. System
C.D. Director-Point of Contact for developers
Have not implemented fully
Still evaluating
City/County relationship good/reasonable
County IDA-not part of county government
County in midst of strategic plan
Business recruitment strategy
No recruitment package
Case by case right now
Usually IDA gets involved
Would like to see one

Third Topic: Land Use

Future Land Uses
Housing
Foot traffic
Retail-niche
No grocery store in city limits

Fourth Topic: Events

Fabulous Fridays
Music
Car show theme
Halloween parade
Floats, costumes
Thousands of people, every kid in the city
Tree lighting/Santa Claus Parade
4th of July Festival-Neahwa Park
Pit Run 10K-honor trooper killed

City would support more events

Fifth Topic: Support Infrastructure

Parking
80% of time parking is available on Main St.
Last year put machines in city lots but council reverted back to free
Parking not problem
Wayfinding some improvement coming but more can be done
Gateways could be better
Streetscape project in the works for spring
Removing streetscape planters to be replaced with brick and wrought iron
Redo benches with new slats
Replace garbage and recycling containers
Maybe put bandstand in the plaza

Other Topics/Questions

Other

Revamp entrance to Neahwa Park
Revamp ball park
$15M

- Tear down five (5) abandoned buildings
- 20 units/affordable 40 units/senior housing
- Rehab. existing buildings

Interview Notes

City of Oneonta – Focus for the Future of Main Street Economic Development Planning Study

Interview With: Bill Kerbin
Interviewed By: Jim Martin and James Stevens
Date and Time: Monday, October5, 2015 @ 2:00pm

First Topic: Economics

Assets/Strengths
Good, overall in good shape
There are a few vacancies and downtown could use improvements
Diverse offerings, good restaurants, retail, specialty shops
- Restaurants
  - Italian
  - Sandwiches
  - Full service
  - Mixed cuisine
- Clothing stores/specialty
- Not many services

Different age groups in downtown families, kids, college students
Chip Klugo development
Bomber's Burrito coming

Challenges
Buildings-older by in large
Help needed with fix-ups, facades and roofs
Vacant stores-some
Restaurants-maybe too many-competing
Who are supporting
Perception that parking is limited

Competitive Advantages
Park areas
Tree lined streets
Historic architecture
Walkable-close proximity

Relationship with Colleges
Mixed
Somewhat taken for granted
Some tension over student behaviors

Patrons
Students/young people
Varies with time of year
- Tourists in summer
- Baseball camps as a draw

Property Owners
Not enough experience to know

Second Topic: Economic Delivery System

City has assistance programs
- Micro Ent. Grant-equipment/working cap.

Grants through CFA
City supports through grant sponsorship
- Main St.
- CDBG

Individual case by case basis as to how incentives are applied
Larger/industrially oriented county IDA
Need guidance from this effort-policy matter
- Are there incentives we could do?

Eight (8) member –ward based
City's role is aggressive
Bring synergy and making sure strategies working together
Destination Oneonta used to be focused on downtown, now more promoting area beyond downtown

Third Topic: Support Infrastructure

<u>Parking</u>
Limited availability of supply
Perception of patrons

Fourth Topic: Events

Farmers Market
Fabulous Fridays
Jazz Fest (not downtown)
O Fest in April
Pit Run in Fall, activities in downtown
Tree lighting/santa claus in Muller Plaza
City's role in events is limited, Destination Oneonta runs them
Talk to Bill Mitice in Engineering about how events impact downtown operations

Fifth Topic: Land Use

Two mixed use zoning districts in downtown area
Looking at a hotel on Market Street, IDA is doing a study
Maybe Market Street can accommodate some office space with retail
Some talk about a food hub on former Ford site, IDA project

Other Topics/Questions

Other people to talk to
- Barbara Ann Heegan at the Chamber of Commerce
- Luisa Montanti, Manager at Southside Mall

Interview Notes

City of Oneonta – Focus for the Future of Main Street Economic Development Planning Study

Interview With: Bob Brzozowski
Interviewed By: Jim Martin and James Stevens
Date and Time: Monday, October5, 2015 @ 3:00pm

First Topic: Economics

Downtown pretty stable/names of stores changed
Oneonta doesn't have a lot of ups and downs, pretty steady economy
Would have liked to retain some businesses that have gone, but Destination Oneonta found that outside of control to save long standing stores
    Stevens Hardware/Fish & Game
    Sport-Tec High End Sporting Goods
Micro Enterprise Grant Program
Otsego Bicycle
McLaughlin's Clothing Store-from Norwich-second store in Oneonta

<u>Advantages</u>
Architecture-historic
Historic Pres.-economic tool
Local businesses
    More invested
Small, manageable scale, small changes can jave a big impact
Critical mass for restaurants

<u>Challenges</u>
Online shopping
Some types of businesses
    Tattoo parlors
    "Head" shops
Lack of grocery store in downtown, can be hard for students without a car – conveniences stores Walgreens and Rite Aid fill role
Perception (not widely held by all) of lack of safety due to student fights, loitering
Some absentee landlords
Upper story vacancies
Some business owners are risk adverse
Hard to get merchants engaged

<u>Draws/Drivers to Downtown</u>
History center with 5,000 or 6,000 visitors per year
Mass of restaurants
Colleges/baseball camps-tourism

<u>Segments of Comm./Likely to Frequent Downtown</u>
Depends on time of day
College at night
Preserved safety issue to some degree
Good police force-Dennis Nayor

<u>New downtown businesses</u>
People want to see more clothing stores
Women's clothing just opened
McLaughlin's shoe and cloth
    Patrons are from a fairly wide distance

Jeff House- he would have two other market studies of where people come from

Relationships Between City and Colleges
Not much working relationship
Both involved in community
Relationships different with each because of public and private nature – Hartwick may have more flexibility in community relationship due to institutional independence

Owners
Ford Block-*Sarkesian Family*
2nd and 3rd floors empty

Peter Clark-several buildings
House-30 businesses
Former council member

Ed May-Chair of ZBA
West half of Oneonta Hotel
5th Floor-Otsego IDA
Business owners conservative-risk adverse

Vacant residence fee-in place- currently $500 per residence (regardless of number of units)
Vacant business fee-to be adopted/under consideration

$500.00/yr. for vacant houses

Ed-Delivery system

Second Topic: Economic Delivery System

Bill K.-City's single point of contact

System Formalized?

Destination Oneonta Design Committee/Events Committee are active

Greater Oneonta Econ. Dev. Council (G.O. E.D.C (think tank)
  Al Calone
  Bill Schuh
Citizens Voices-Business oriented
Job Corps-Chris Kuhn-Director
Dianne Georgeson Chairman of F.O.F. Future for Oneonta Foundation
  Annual Endowment
  Mission:" Make positive change

Creating venture capital fund-Ed May group of angel investors to support local businesses and start ups
CFA application for entertainment district

Third Topic: Events

"O" Fest largest event – estimated 6,000 to 10,000 people downtown
Wvents with Brewery Ommegang
So far, no resistance from DOT on downtown street closure
Event resistance due to student drinking, noise, trash

Appendix B

Survey Tabulation and Analysis

City of Oneonta

FOCUS ON THE FUTURE OF MAIN STREET

Downtown Customer Survey – Tabulation and Analysis

Prepared by:

The LA GROUP
Landscape Architecture & Engineering P.C.

In Association with: ConsultEcon, Inc.

March 2016

City of Oneonta
FOCUS ON THE FUTURE OF MAIN STREET

Downtown Customer Survey – Tabulation and Analysis

INTRODUCTION

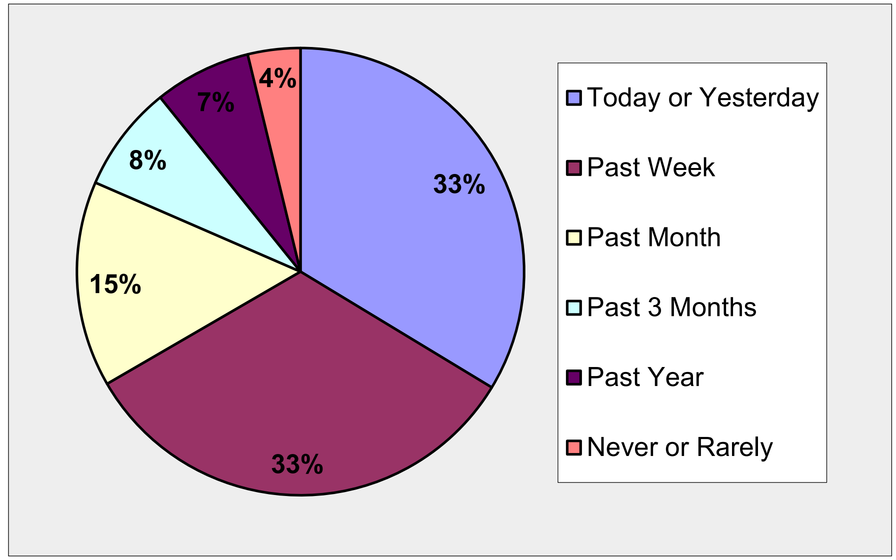
The City of Oneonta with the assistance of a team of consultants led by the LA Group is undertaking taking an economic and market analysis of the downtown Oneonta. The intent of the study is to assess existing conditions in the downtown area, both in terms of the built environment and overall economic performance. The plan will then put forth a strategy for positioning downtown to expand and improve. A critical element of the study will be determining how consumers and patrons of the market area served by downtown businesses view the shops, restaurants and services found there and what elements are missing or could be improved upon. As a basis for the strategy development the LA Group has been coordinating a series of outreach efforts including the conduct of focus group meetings for downtown property owners, downtown business owners, and downtown area residents. The outreach effort also includes the preparation of a survey instrument which focuses on obtaining input from customers of downtown businesses and service providers to gain their impression of what works in the business environment downtown and what could be improved upon. The survey ran from late November 2015 through mid-December 2015 and was capable of being accessed electronically through a link from the City's webpage. The survey was also available in hard copy at City Hall and at locations throughout the downtown area.

The LA Group collaborated with another consultant team member, ConsultEcon on the survey development. The specific division of responsibilities between the two firms was as follows: ConsultEcon developed the questions and the LA Group was responsible for formatting, distribution, tabulation and analysis. The survey consisted of nineteen (19) questions with respondents being asked to share their tendencies regarding shopping choices they have made and to make evaluative preferences as to future recommendations. The response period closed on Friday, December 18, 2015 and a total of 1,332 responses were received; of these, nineteen (19) hard copy responses were returned to the Community Development office at City Hall and the remaining 1,313 were completed online. The purpose of this interim report is to provide a stand-alone tabulation and analysis of the responses as received. The information from the tabulation and analysis as performed will also be used in the development of the overall strategy that will follow the distribution of this report.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #1: When Was the Last Time You Went to Downtown Oneonta?

Answer Options	Response Percent	Response Count
Today or Yesterday	33.7%	449
Past Week	33.0%	439
Past Month	14.9%	199
Past 3 Months	7.7%	102
Past Year	7.0%	93
Never or Rarely	3.8%	50
	answered question	1332
	skipped question	0



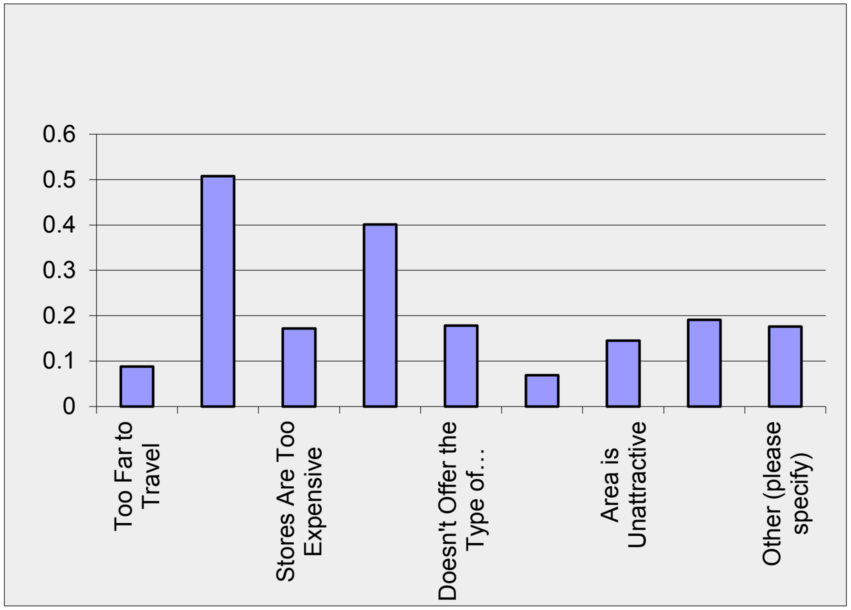
Summary Analysis of Question #1:

- Over 66% of the respondents indicate that they have visited downtown either within the last day or two or within the last week.
- The recent nature of a majority of the visitation is an indicator that downtown is a destination and that the products and/or services offered in downtown are relevant and useful to the market being served. As such this is a strong indicator of the viability of downtown as a community center for commercial, service-related, and residential activity.
- Further insight is provided by response to a subsequent question as to the specific reasons for visitation.
- This circumstance should be regularly monitored to identify shifts in these levels.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #2: If You Have Never Visited or Rarely Visit Downtown Oneonta, What Are the Reasons? (CHECK ALL THAT APPLY)

Answer Options	Response Percent	Response Count
Too Far to Travel	8.8%	65
Doesn't Have the Type of Stores or Goods/Services That I Need	50.8%	375
Stores Are Too Expensive	17.2%	127
Parking is Not Adequate	40.1%	296
Doesn't Offer the Type of Restaurants or Entertainment That I Enjoy	17.8%	131
Area is Unsafe	6.9%	51
Area is Unattractive	14.5%	107
Stores/Business Hours Are Not Convenient	19.1%	141
Other (please specify)	17.6%	130
	answered question	**738**
	skipped question	**594**



NOTE: The summary analysis for Question #2 is found on the next page.

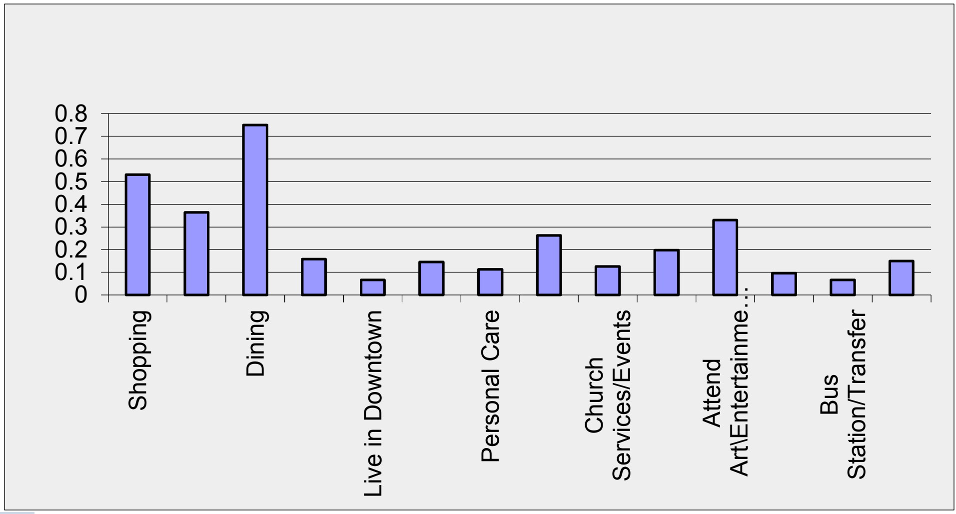
Downtown Customer Survey – Tabulation and Analysis

Summary Analysis of Question #2:

- The lack of needed goods and services is the number one reason for the lack of visitation or rarely visiting downtown. As evidenced in responses to question #10, the "Southside Mall area" and online shopping are the primary alternative methods by which shoppers are obtaining goods and services.
- The difference between responses to the question above and the relatively positive response to recent visitation in question #1 likely rests with the level of basic services (governmental, financial, legal, medical, institutional, recreational) and the mix of uses (service-oriented, commercial, dining, residential, institutional) that are found in or in close proximity to downtown. Although downtown businesses may find it challenging to compete with product offerings of national retailers found in the Southside Mall area or online. The makeup and heritage of downtown in combination with superior customer service (noted by respondents) and the mix of products, services and land uses are noteworthy attributes. This formula of comparatively better customer service, diverse products and mix of land uses is the basis for a prescription for future growth and prosperity for downtown Oneonta.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #3: When You Come to Downtown Oneonta, What Are the Usual Reasons for Your Trip? (CHECK ALL THAT APPLY)



Answer Options	Response Percent	Response Count
Shopping	53.1%	707
Banking	36.5%	486
Dining	75.0%	999
Health Care	15.8%	210
Live in Downtown	6.6%	8
Go to Work	14.6%	195
Personal Care	11.3%	150
Post Office	26.3%	350
Church Services/Events	12.5%	166
Library	19.7%	263
Attend Art\Entertainment\Community Event	33.0%	439

The LA GROUP
ConsultEcon, Inc.

Downtown Customer Survey – Tabulation and Analysis

Government Services	9.6%	128
Bus Station/Transfer	6.7%	89
Other (please specify)	15.0%	200
	answered question	**1332**
	skipped question	**0**

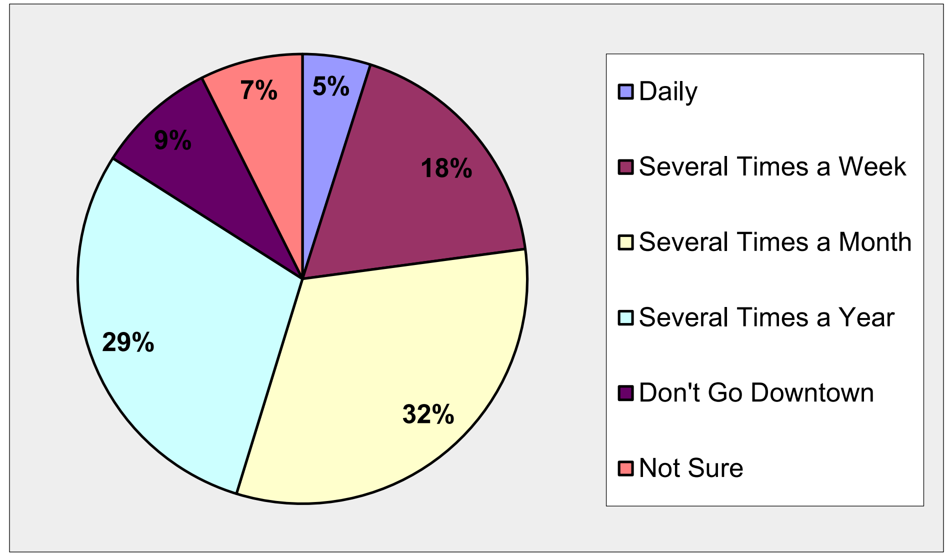
Summary Analysis of Question #3:

- The responses to this question concerning the reasoning for downtown visitation validate the positive impact of offering diverse services and a mix of land uses.
- Dining and shopping are clearly the leading reasons for visitation. However, there is strong balance between the next tiers of responses relating to accessing the following services: Financial (banking); governmental (post office and City Hall); recreation (art/entertainment/community event); education (library); and medical (health care).

Downtown Customer Survey – Tabulation and Analysis

QUESTION #4: How Often Do You Come to Downtown Oneonta to Purchase Goods or Services?

Answer Options	Response Percent	Response Count
Daily	4.9%	65
Several Times a Week	18.0%	240
Several Times a Month	31.9%	425
Several Times a Year	29.3%	390
Don't Go Downtown	8.6%	114
Not Sure	7.4%	98
	answered question	**1332**
	skipped question	**0**



Summary Analysis of Question #4:

- The responses to this question indicate that there is improvement to be made in the frequency of visitation to downtown. The optimal scenario is for a fundamental shift in the response pattern that yields "daily" or "several times per week" as the first and second level of visitation frequency.
- Gains will come from continued improvement in the diversity and quality of the food served and the goods and services offered in the downtown area as well as continued expansion of the amount of year-round market-rate housing offered. Increased residency within downtown buildings can be achieved through continued conversion of upper floors of downtown buildings into permanent housing units. A continued increase in the diversity of food served, goods sold, and services offered in downtown can be achieved through instituting a strategic program of targeted business recruitment and entrepreneurial development.

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Downtown Customer Survey – Tabulation and Analysis

QUESTION #5: Below is a List of Some of Downtown Oneonta's Characteristics - For each one, please choose the number that indicates if you think the characteristic is excellent, good, fair, or poor.

Answer Options	Excellent	Good	Fair	Poor	Don't Know	Rating Average	Response Count
Selection of Goods and Services	37	335	531	237	15	2.88	1155
Quality of Goods and Services	163	602	288	67	29	2.30	1149
Cost of Goods and Services	44	469	443	159	34	2.71	1149
Customer Services	183	530	275	76	74	2.41	1138
Selection of Restaurants	199	458	333	146	18	2.42	1154
Quality of Restaurants	215	571	270	59	35	2.24	1150
Store Hours	47	404	426	207	65	2.86	1149
Amount of Parking	90	371	324	328	42	2.88	1155
Location of Parking	75	352	347	335	40	2.92	1149
Attractiveness of Store Fronts	92	414	420	202	21	2.69	1149
Attractiveness of Store Interiors	98	520	384	105	44	2.55	1151
Attractiveness of Public Spaces	109	459	393	164	21	2.59	1146
Crime and Safety	189	496	274	129	65	2.47	1153
Cleanliness	123	478	374	157	18	2.54	1150
Traffic	62	408	455	194	25	2.75	1144
Sales and Promotions	16	243	449	275	159	3.28	1142
Special Events	138	446	352	120	93	2.64	1149
						answered question	**1160**
						skipped question	**172**

NOTE: The summary analysis for Question #5 is found on the next page.

Downtown Customer Survey – Tabulation and Analysis

Summary Analysis of Question #5:

- The top five (5) characteristics selected as "excellent" were as follows:
  1) Quality of Restaurants; 2) Selection of Restaurants; 3) Crime and Safety; 4) Customer Service; 5) Quality of Goods and Services
- The top five (5) characteristics selected as "good" were as follows:
  1) Quality of Goods and Services 2.) Quality of Restaurants; 3) Customer Service; 4) Attractiveness of Store Interiors; 5) Crime and Safety
- The top five (5) characteristics selected as "poor" were as follows:
  1) Location of Parking; 2) Amount of Parking; 3) Sales and Promotions; 4) Selection of Goods and Services; 5) Attractiveness of Storefronts
- The increase in the number of restaurants and the diversity of dining experiences and food selections appear to be widely well-received and as such, these attributes are principal draws for patrons seeking these experiences. This is an attribute that can be further expanded upon and it can also be a driver to increase foot traffic among adjoining businesses in and around downtown Oneonta.
- The strong response that downtown is a safe place is crucially important and this is positive feedback regarding the efforts of the City Police Department. Continued diligence is required to keep this positive level of public perception.
- The responses that provide high marks for the ***quality*** of restaurants, goods and services; ***customer service***; and the ***attractiveness*** of store interiors are instructive as to the methods downtown businesses can employ to distinguish themselves from competitors whether they be national retailers or online. The offering of high-grade products and menu selection; the provision of service to customers that is personable and displays thorough knowledge of the product or service offered; and in a setting that is welcoming and presents a thoughtful and well-executed product/service display are distinguishing features that are being noted and appreciated by customers.
- The location and amount of parking are *perceived* as the poorest characteristics of the downtown area. This is inconsistent with the quantifiable availability of parking throughout varying days of the week or times of the day. The responses relating to parking amount and location are consistent with widely held perceptions of parking in a downtown setting versus the perceived parking characteristics at a shopping mall or strip shopping center. The presence of a large parking lot at the front of the mall or shopping center creates a false sense of access and convenience. Numerous studies have shown that the amount of parking and its location at large shopping centers *in fact* share the same characteristics in terms of parking availability and walking distance to the storefront as those of a downtown setting, and in some instances they are quantifiably worse. The principal method to overcome these misperceptions is implementing a strategic systematic wayfinding program that provides constant, consistent and convenient information as to the location and availability of on-street and off-street parking in and around downtown. Ongoing monitoring of parking should be instituted to maintain adequate availability in relationship to demand and location.
- The remaining responses concerning poor characteristics relate to sales and promotions, selection of goods and services and attractiveness of storefronts. The price paid for a product or service is paramount to the customer. Therefore, the emphasis on the quality and distinguishing features of the product or service and the customer service provided can offset emphasis on low pricing. The high marks noted in the responses for interior attractiveness should extend to the building exterior as the benefits associated with a store tenant's or proprietor's attention to interior details will be lost if the property owner does not provide welcoming and alluring exterior building features. The City and proactive property owners have demonstrated success in jointly utilizing available resources to restore exterior building features and this joint approach should continue. In instances were long-term decay and blight (exterior and interior) continues consideration could be given to heightening local code standards and invoking specialized levies as allowed in state law.

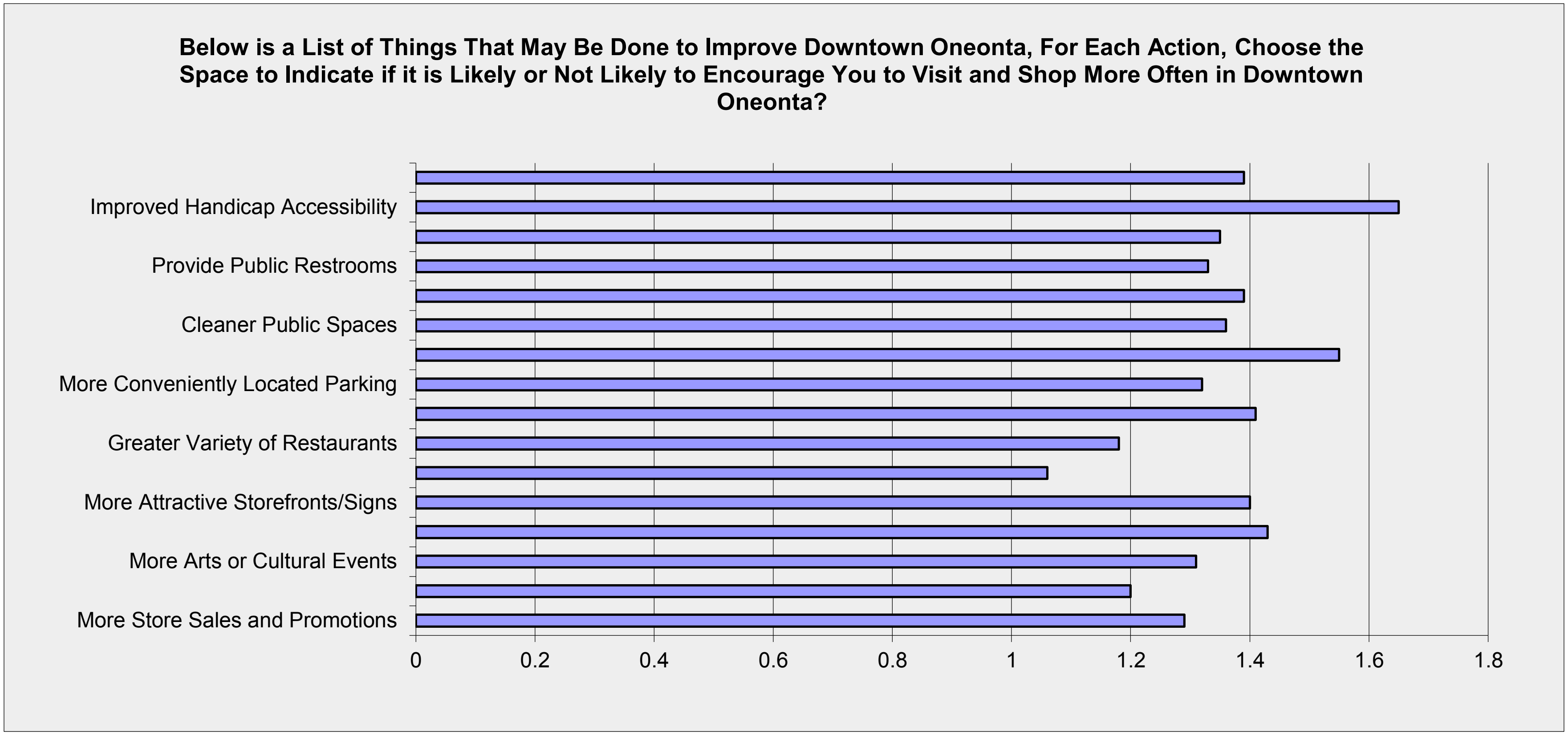
Downtown Customer Survey – Tabulation and Analysis

QUESTION #6: Below is a List of Things That May Be Done to Improve Downtown Oneonta, For Each Action, Choose the Space to indicate if it is Likely or Not Likely to Encourage You to Visit and Shop More Often in Downtown Oneonta?

Answer Options	Likely	Not Likely	Rating Average	Response Count
More Store Sales and Promotions	805	326	1.29	1131
More Special Events or Festivals	904	227	1.20	1131
More Arts or Cultural Events	780	343	1.31	1123
More Attractive Store Displays/Interiors	639	488	1.43	1127
More Attractive Storefronts/Signs	670	449	1.40	1119
Greater Variety of Stores	1078	65	1.06	1143
Greater Variety of Restaurants	919	208	1.18	1127
More Parking	662	454	1.41	1116
More Conveniently Located Parking	763	358	1.32	1121
Better Outside Lighting	491	608	1.55	1099
Cleaner Public Spaces	705	403	1.36	1108
Improved Pedestrian Safety	678	441	1.39	1119
Provide Public Restrooms	750	370	1.33	1120
Provide Public Restrooms	669	367	1.35	1036
Improved Handicap Accessibility	380	714	1.65	1094
Improved Traffic Flow/Safety	679	431	1.39	1110
			answered question	**1160**
			skipped question	**172**

NOTE: The chart of responses for Question #6 is found on the next page.

Downtown Customer Survey – Tabulation and Analysis



NOTE: The summary analysis of Question #6 is found on the next page.

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Downtown Customer Survey – Tabulation and Analysis

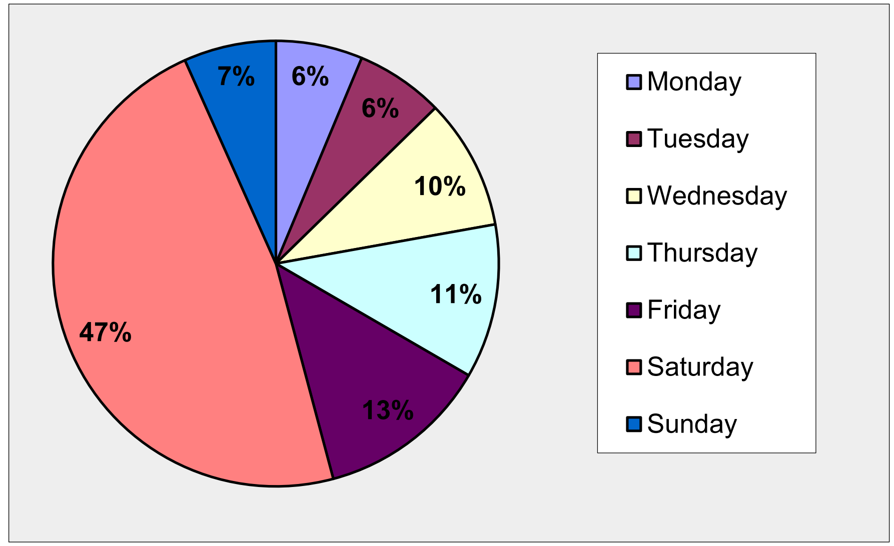
Summary Analysis of Question #6:

- The top three (3) items that will likely encourage increased visitation to downtown Oneonta include:
  1) Greater Variety of Stores; 2) Greater Variety of Restaurants; 3) More Special Events or Festivals
- The top responses to question #6 as noted above, to some degree validate the responses to other aspects of this survey as the lack of a variety of products and/or services in downtown was previously listed as a principal need. The stores pursued should emphasize the traits as referenced in the responses to question #5 and further referred to in the associated analysis. These traits include: the offering of quality products; a knowledgeable and courteous approach to customer service; maintenance of high standards of quality, and a diversity of offerings that are typically unavailable from national chain stores.
- The greater variety of restaurants is intriguing as even as the number and type of restaurants in downtown has increased in recent years the responses indicate that there is room for additional restaurants and a wider variety of menu choices.
- Downtown Oneonta by virtue of its overall layout; close, walkable proximity to residential neighborhoods and college campuses; linear streetscapes; the comparatively narrow right-of-way of Main Street; historic qualities; well-scaled building stock; as well as access to public parks and numerous of public spaces is ideally suited as a venue for numerous events and festivals. The responses indicate that the public fully recognizes these attributes as the events that are currently held are widely well-received and enjoyed. Furthermore, these physical qualities support a complementary relationship between events and festivals and the businesses in the downtown area.
- In compiling additional restaurants, stores, and entertainment venues and events the effort should be mindful of achieving and maintaining a critical mass that attains "destination" status for the downtown area. Destination status in this context means a shopping/dining/entertainment experience that can require the better part of day with visitation that yields some combination of shopping, dining and attendance at, or participation in, an event or recreational activity.
- The top three (3) items that will not likely encourage increased visitation to downtown Oneonta include:
  1) Improved Handicapped Accessibility; 2) Better Outside Lighting; 3) More Attractive Store Displays
- These noted responses indicate that basic aspects of public infrastructure such as lighting and handicapped accessibility are performing well and as a business concern it appears that the attractive store displays are being noticed and are having the intended impact.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #7: On What Day of the Week Do You Generally Shop Most Often?

Answer Options	Response Percent	Response Count
Monday	6.3%	68
Tuesday	6.4%	69
Wednesday	9.5%	102
Thursday	11.2%	121
Friday	12.5%	135
Saturday	47.5%	512
Sunday	6.7%	72
	answered question	**1079**
	skipped question	**253**



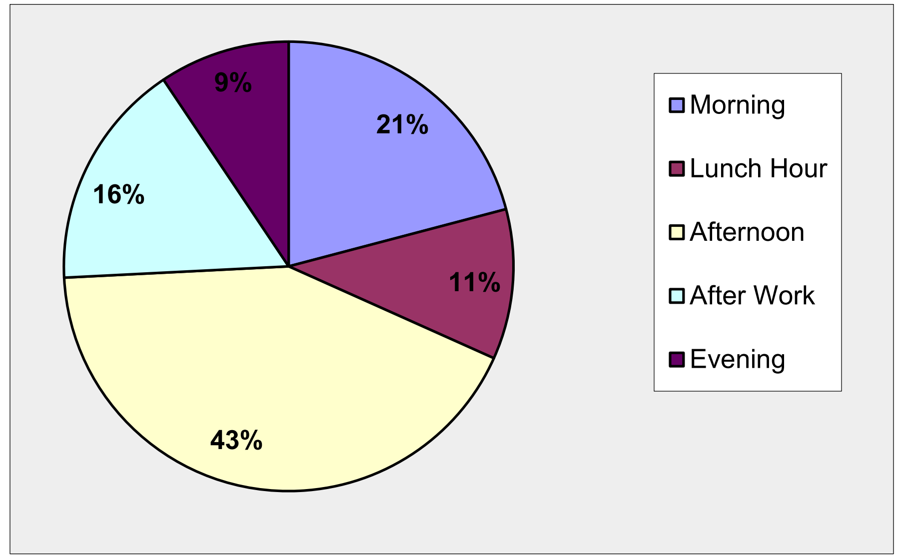
Summary Analysis of Question #7:

- The responses will be directly helpful to the business community of downtown as patronage to the area appears to be highest from Thursday through Saturday.
- Consideration should be given to maximizing store operational hours during this three day period of the week on a consistent basis throughout the year. Consistency in the hours of operation is a key consideration as customers appreciate reliable and predictable access that stems from such consistency.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #8: At What Time of Day Do You Generally Shop Most Often?

Answer Options	Response Percent	Response Count
Morning	20.9%	226
Lunch Hour	10.8%	116
Afternoon	42.5%	459
After Work	16.4%	177
Evening	9.4%	101
	answered question	**1079**
	skipped question	**253**



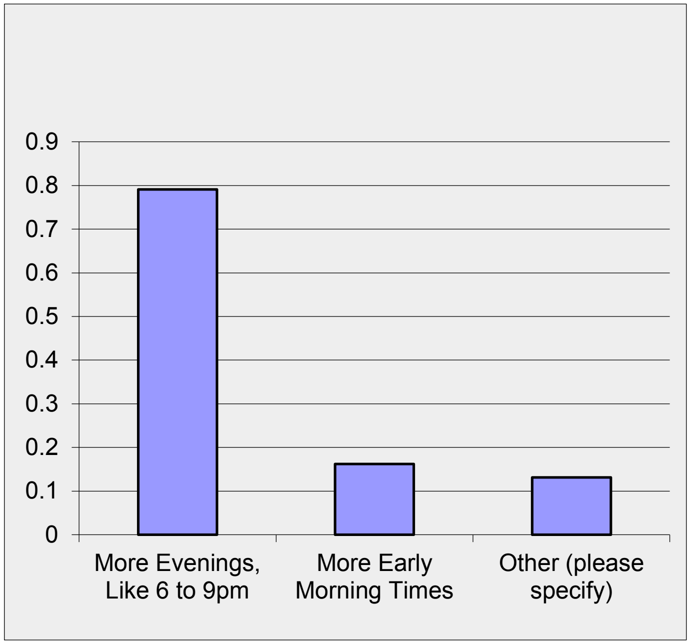
Summary Analysis of Question #8:

- Within the business day it appears that afternoons are the most popular time for customers to access the shops and services in downtown. This response is logical in consideration of the responses to question #7 which indicates that Saturday is the single most popular day to visit downtown.
- The "morning" response was the second most selected response and is likely reflective of the increasingly diverse nature of the goods and services being offered in the downtown area. Many service providers are open during morning hours (banks, doctors, attorneys) and there are several restaurants (coffee shops) that are popular morning destinations.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #9: What Times Would You Prefer Downtown Oneonta Shops to be Open? (CHECK ALL THAT APPLY)

Answer Options	Response Percent	Response Count
More Evenings, Like 6 to 9pm	79.1%	854
More Early Morning Times	16.2%	175
Other (please specify)	13.1%	141
	answered question	**1079**
	skipped question	**253**



Summary Analysis of Question #9:

- The responses indicate that expansion of evening hours for downtown businesses would be most beneficial.
- It is understood that the nature of downtown business as small sole proprietorships or family-owned businesses make it difficult for operations to occur over multiple nights during each week of the year. Additionally, the cost-benefit of expanded hours for multiple weekday evenings is also difficult to justify.
- Consideration should be given to a coordinated and consistent effort among downtown businesses to remain open during a widely agreed upon weekday evening (i.e. Thursday evening till 8:00pm). Such an effort, particularly if universally adhered to would be responsive to the preferences of the customer base as indicated in the response to this question.

Downtown Customer Survey – Tabulation and Analysis

Downtown Customer Survey – Tabulation and Analysis

QUESTION #10: Below is a List of Different Types of Products and Services For each one, choose the column that indicates where you primarily shop for or obtain the good or service.

Answer Options	Downtown Oneonta	South Side	Norwich	Cooperstown	Cobleskill	Mail Order	Internet	Rating Average	Response Count
Groceries	40	886	25	28	7	1	3	2.04	990
Clothing	84	536	15	0	2	45	323	3.36	1005
Home Furnishings	40	602	13	4	9	21	223	3.04	912
Hardware/Home Improvement	35	902	15	18	8	3	28	2.13	1009
Sporting Goods, Dance & Hobby Supplies	83	649	18	6	2	18	181	2.76	957
Books	435	145	10	6	4	24	361	3.12	985
Discount Stores	157	562	27	9	9	15	139	2.54	918
Gifts/Framing/Crafts	382	286	13	10	7	21	200	2.56	919
Medical Services	416	168	22	210	7	4	28	1.95	855
Hair/Nail/Beauty Services	391	382	19	21	7	1	30	1.75	851
Other Services	157	257	13	27	9	11	155	2.88	629
Fast Food/Takeout	357	493	17	14	1	2	11	1.69	895
Dining Out	655	261	16	29	3	0	3	1.39	967
Other (please specify)									149
								answered question	**1051**
								skipped question	**262**

NOTE: The chart of responses for Question #10 is found on the next page.

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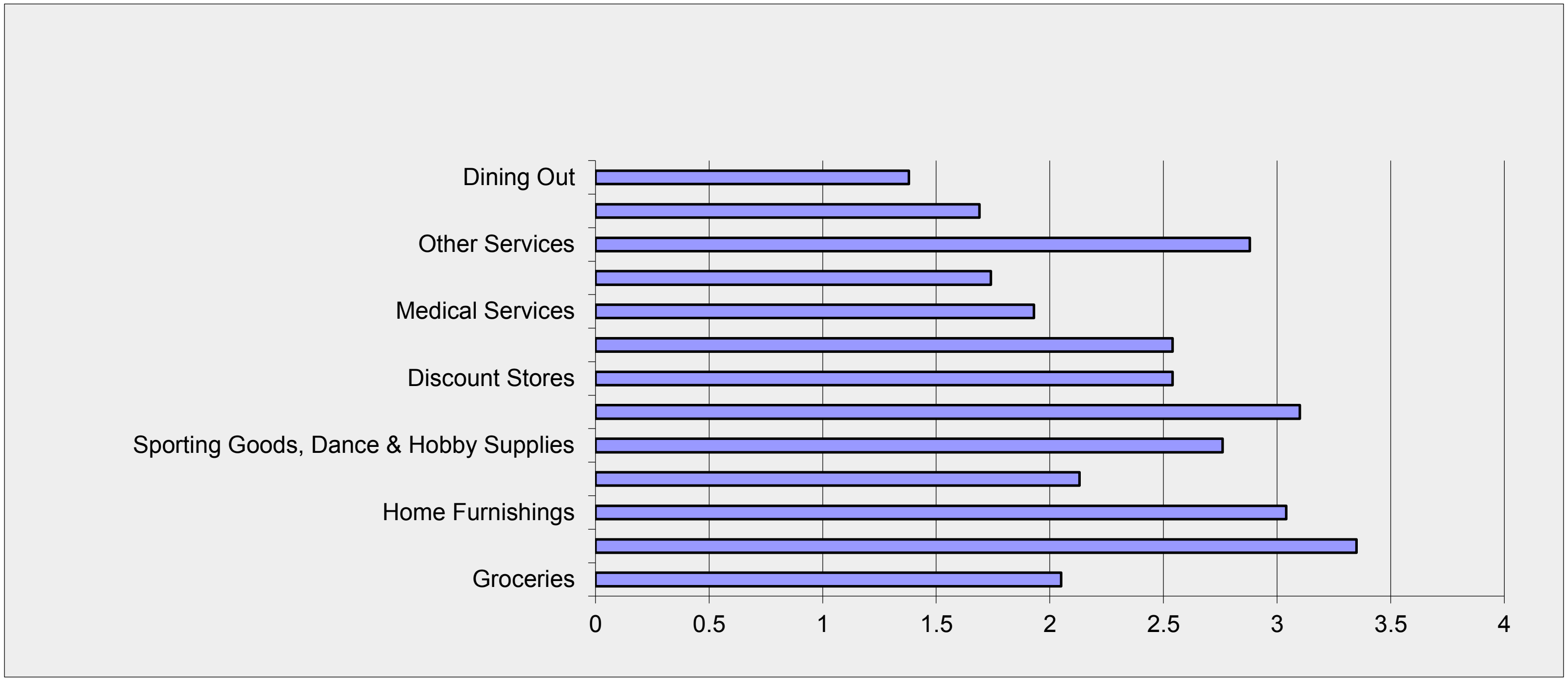


NOTE: The summary analysis for Question #10 is found on the next page.

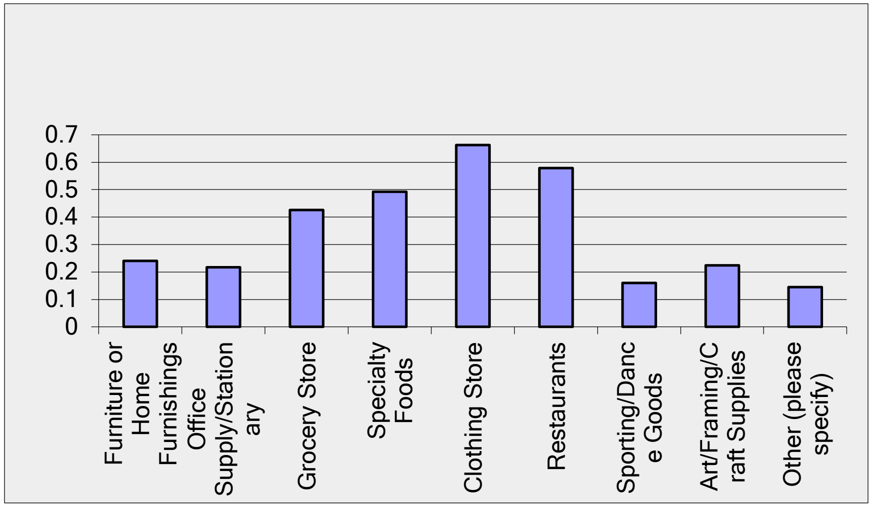
Summary Analysis of Question #10:

- According to the response tabulation downtown Oneonta is the principle resource for books, gifts/framing/crafts, medical services, hair/nail/beauty services, and dining out.
- The "Southside Mall" area is the leading resource for groceries, clothing, hardware/home improvement, sporting goods/dance/hobby supplies, fast food/take-out, and other services.
- Although the responses indicating the internet as a primary source did not lead any single category, online shopping is an increasingly convenient shopping venue and the major outlets (i.e. Amazon, Etsy, Walmart online, Target online) are experiencing year-to-year sales and product volume increases.
- The tendencies displayed in the responses to Question #10 are typical of market dynamics between downtown commercial districts, suburban commercial districts, and online shopping sites. In consideration of the attributes inherent with suburban commercial districts (predominantly national or large-scale regional vendors in shopping centers that feature no-cost, off-street parking). The vendors have access to merchandise supply chains that consistently offer numerous product choices that are featured in multi-format advertisement and marketing programs. Disadvantages of this format include stale, homogenous, and mundane environments that have few qualities that distinguish the shopping environment; impersonal customer service is highly variable with sales staff that typically experience high rates of turnover and therefore has little product knowledge. The previously mentioned characteristics can lead to a perception of a shopping experience that is at best unremarkable and can quickly evolve to being perceived as arduous.
- The primary attributes of online sales are primarily convenience – accessing vendors from laptops, tablets or smart phones on a "24/7" basis; and access to a nearly limitless selection of products delivered with increasing speed, reliability and convenience via express shipment. The detractions from online sales are the obvious loss of the tactile aspects of product selection; the highly variable level of quality of the products purchased; the limited means to accurately determine product elements during the purchase process (i.e. quality, color, on-screen product perception versus on-site product experience); and the loss of elements that can contribute to a positive purchase experience (i.e. direct exposure to the product, access to one-on-one vendor product knowledge, and the opportunity to transcend product purchase from simple fulfillment of a need or accomplishing a task to an "experience" that is pleasant and enriching).
- Therefore, the responses to the question are instructive as to the product areas where downtown is successful and where opportunities exist for future growth of product and service types; the context in which downtown businesses could flourish (establishing synergistic links between complementary activities – i.e. dining and shopping, festival/event attendance and shopping and dining, or entertainment and shopping and dining); and the methods by which downtown businesses may be successful – principally expanding upon the strengths inherent in the setting while exploiting the referenced weaknesses and/or disadvantages of the alternative shopping formats.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #11: If Downtown Oneonta Added New Stores, Which Types Would Attract You to Shop in Downtown more Often? (CHECK ALL THAT APPLY)

Answer Options	Response Percent	Response Count
Furniture or Home Furnishings	24.0%	259
Office Supply/Stationary	21.7%	234
Grocery Store	42.6%	460
Specialty Foods	49.2%	531
Clothing Store	66.2%	714
Restaurants	57.8%	624
Sporting/Dance Goods	16.0%	173
Art/Framing/Craft Supplies	22.4%	242
Other (please specify)	14.5%	156
	answered question	**1079**
	skipped question	**253**



NOTE: The summary analysis for Question #11 is found on the next page.

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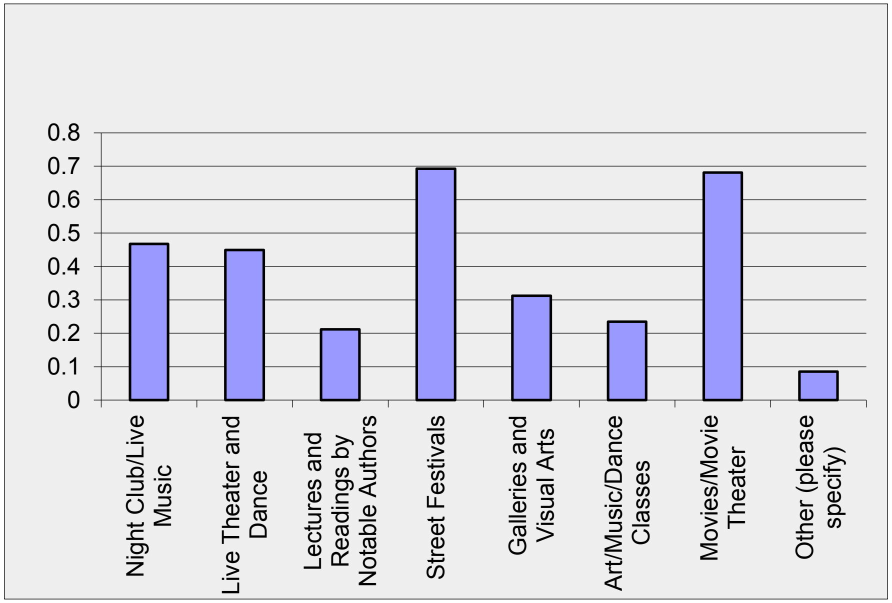
Downtown Customer Survey – Tabulation and Analysis

Summary Analysis of Question #11:

- The top four (4) responses are somewhat closely clustered and include:
  1) Clothing Store; 2) Restaurants; 3) Specialty Foods; and 4) Grocery Store.
- The top responses are consistent with the nature of responses to the other questions in the survey (i.e. the Southside Mall area is the recognized as the primary source for clothing by a majority of the respondents indicating that an opportunity exists for more clothing vendors in the downtown area).
- The high level of response concerning more restaurants is particularly interesting since downtown has recently experienced the addition of more food outlets over the last several years. Through the responses to this survey the customer base has taken note of this circumstance and dining is evolving into a principal draw for patronage downtown and it appears be a segment that can grow further as it attains critical mass. Increased variation in the type of meals (breakfast, lunch and/or dinner), the variety of food offerings and variation of cuisine, and the venue style (sit down, diner, counter service, take-out, etc.) appear to be all areas where growth can occur and downtown can further distinguish itself from other commercial areas or formats.
- Specialty foods and grocery store are notable in that they are consistent with the opportunity to continue to distinguish downtown as a destination area for unique products and services that are not easily found through other venues. Additionally, specialty foods, and groceries are complementary to the concept of expanding the availability of permanent, single family dwellings in the downtown area.
- In lieu of the response to this question the planned food hub on Market Street and Chestnut Street should be directly responsive to the demonstrated demand.

QUESTION #12: What Arts or Entertainment Would Attract You to Downtown Oneonta? (CHECK ALL THAT APPLY)

Answer Options	Response Percent	Response Count
Night Club/Live Music	46.8%	505
Live Theater and Dance	44.9%	485
Lectures and Readings by Notable Authors	21.2%	229
Street Festivals	69.3%	748
Galleries and Visual Arts	31.2%	337
Art/Music/Dance Classes	23.5%	254
Movies/Movie Theater	68.1%	735
Other (please specify)	8.6%	93
	answered question	**1079**
	skipped question	**253**



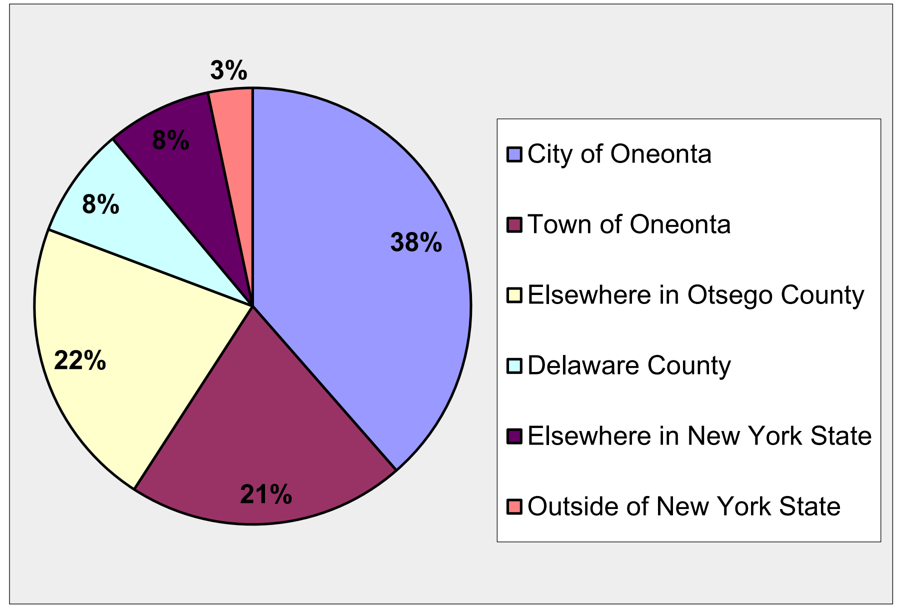
NOTE: The summary analysis for Question #12 is found on the next page.

Summary Analysis of Question #12:

- The response rates supporting street festivals, movies/movie theaters and night club/live music and live theater and dance demonstrate strong support in the market for these activities. The attendance at existing venues (Foothills Performing Arts Center, the B Side Ballroom, etc.) and the events/festivals (the Hometown 4th of July event, the Annual Christmas Tree Lighting, etc.), are indicators that events/festivals in this setting complement existing businesses and bring another unique dimension of activity to downtown. Furthermore, events and festivals reinforce the image of downtown as THE recognized center of the community. This is an attribute of being the community center is unique and is downtown's to claim. The conduct of events/festivals in downtown is an excellent means to that end.
- The entertainment sector represents perhaps, the best opportunity for growth in the downtown area. In addition to events/festivals, the other elements of entertainment – movies, performing arts (theater, music, dance, comedy), concerts, dance clubs, etc. represent opportunities for complementary growth as the frequency and type of such entertainment has not realized its full potential in the downtown area.
- A unique facet of entertainment that is attaining regional and even national prominence is the increasing attendance at little league baseball camps. The camps that are conducted throughout the region are a direct result of the heritage of baseball in the region and the presence of the Major League Baseball Hall of Fame in Cooperstown. These camps are host to thousands of camp attendees and their families each summer. Downtown Oneonta is ideally positioned geographically in the center of these camp locations. The resulting visitation of thousands of people in the region and in need of lodging, dining and associated support service and products places downtown in a unique position to provide these services as well as complementary activities between camp sessions.

QUESTION #13: Where Do You Live?

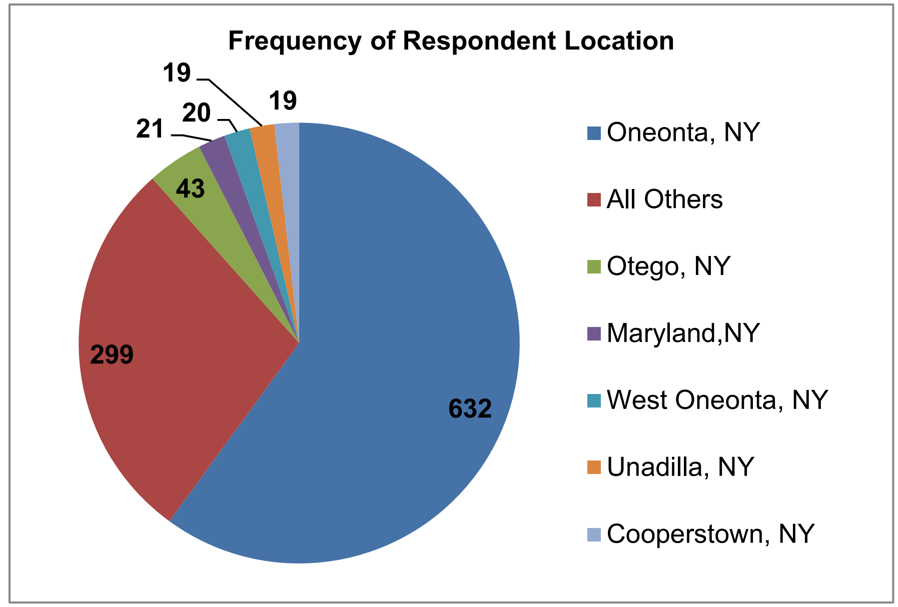
Answer Options	Response Percent	Response Count
City of Oneonta	38.6%	406
Town of Oneonta	20.6%	217
Elsewhere in Otsego County	21.6%	227
Delaware County	8.2%	86
Elsewhere in New York State	7.8%	82
Outside of New York State	3.3%	35
	answered question	**1053**
	skipped question	**279**



Summary Analysis of Question #13: The location of the respondents is consistent with the nature of the customer survey and its "downtown-centric" focus. The rate of response in this circumstance is expected to be strongest from residents within the City and diminish as distance of the respondent from downtown increases.

QUESTION #14: What is Your Zip Code?

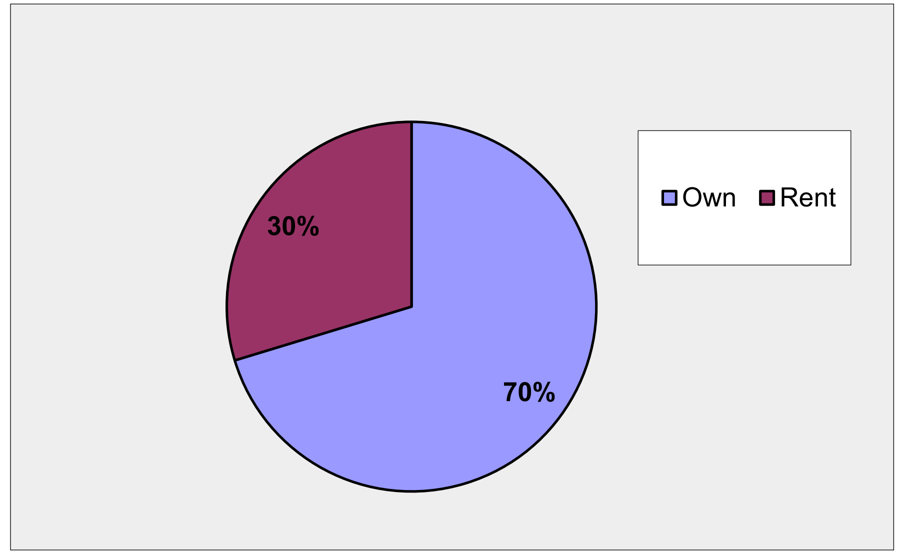
Most Frequent Respondent Location	Response Count	Percent
Oneonta, NY	632	60.0%
All Others	299	28.4%
Otego, NY	43	4.1%
Maryland, NY	21	2.0%
West Oneonta, NY	20	1.9%
Unadilla, NY	19	1.8%
Cooperstown, NY	19	1.8%
	1,053	**100.0%**
	answered question	**1,053**
	skipped question	**279**



Summary Analysis of Question #14: The location of the respondent zip code is consistent with the nature of the customer survey and its "downtown-centric" focus. As with question #13 the rate of response in this circumstance is expected to be strongest from residents within the City and diminish with increased distance from the City.

QUESTION #15: Do You Rent or Own Your Home?

Answer Options	Response Percent	Response Count
Own	70.3%	740
Rent	29.7%	313
	answered question	**1053**
	skipped question	**279**

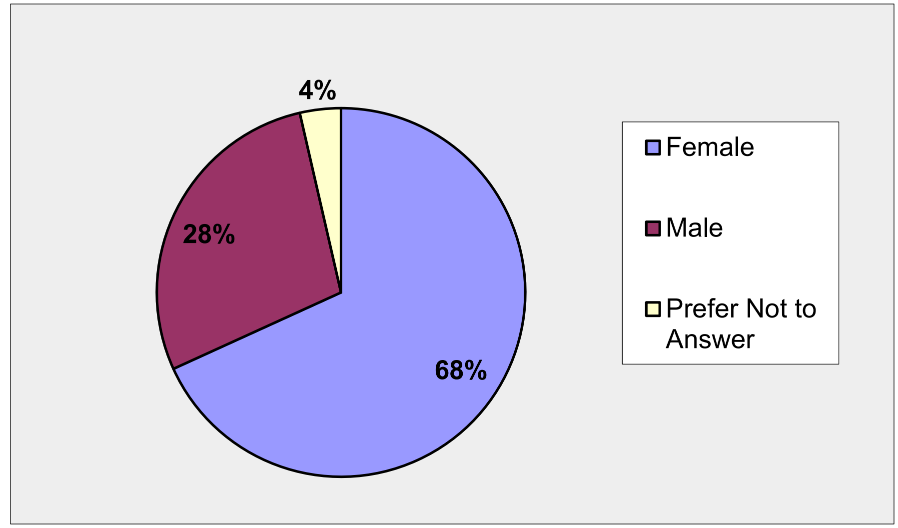


Summary Analysis of Question #15: According to the 2010-2014 American Community Survey as published by the US Census Bureau the breakdown between homeownership and rental occupancy in the City of Oneonta for 2014 was approximately 45% homeownership and 55% rental occupancy. The rate of rental occupancy is somewhat higher by comparison to most upstate cities of similar size. The obvious difference is attributable to the inordinately high number of college students included in the census count of population and the associated rental housing for this basically transient segment of the City population. It is expected that the survey participation rate among college students in the City would be lower and that is borne out in the responses provided to question #17. Therefore, in consideration of the lower response rate among college students it is further expected that home owners would participate at a higher rate in the survey.

Downtown Customer Survey – Tabulation and Analysis

QUESTION #16: What is Your Gender?

Answer Options	Response Percent	Response Count
Female	68.2%	718
Male	28.2%	297
Prefer Not to Answer	3.6%	38
answered question		**1053**
skipped question		**279**



NOTE: The summary analysis for Question #16 is found on the next page.

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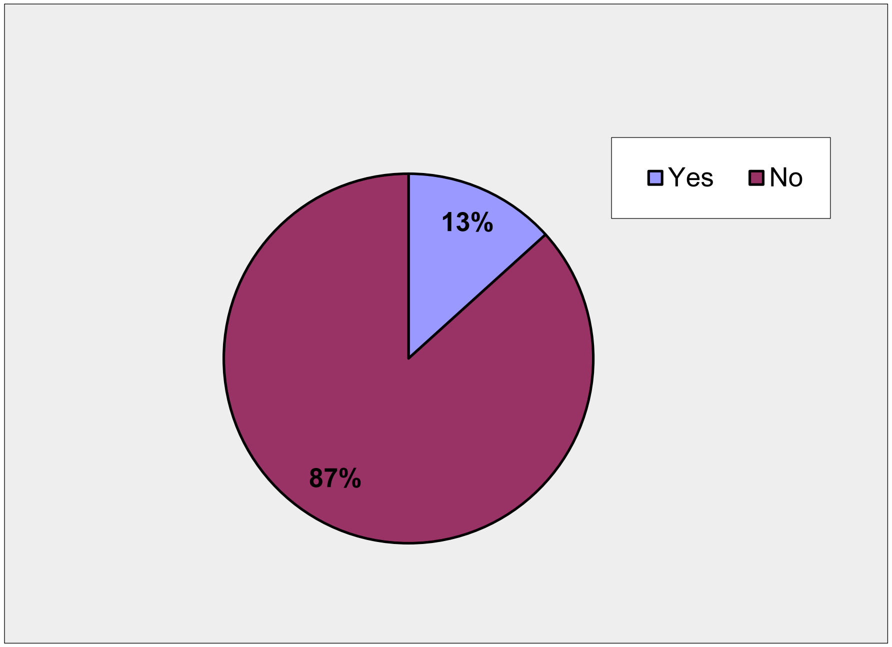
Summary Analysis of Question #16:

- According to the 2010-2014 American Community Survey as published by the US Census Bureau the breakdown between males and females in the City of Oneonta for 2014 was approximately 55% female and 45% male. This accounts for a portion of the disparity in the rate of response between these two cohorts of the population. Furthermore, it expected that females account for a majority of the consumers which will further contribute to the higher response rate in consideration of the target audience of the survey.
- Female respondents have mostly frequented downtown today or yesterday (33.45%) or within the last week (34.82%) for a total of 67.77% between the two response choices; male respondents frequent downtown more often: Today or yesterday (44.11%) or within the last week (33.31%) for a total of 77.44% for the two response choices.
- Both gender cohorts primarily come to downtown to dine – females were at 77.99% while 70.03% of males indicated they come for dining.
- Both gender groups would like to see a greater variety of stores – females (95.06%) and males (93.77%).
- Among the choices of venues (Southside Mall area, Norwich, etc.) downtown received the highest marks for dining out from both gender cohorts – females (67.13%) and males (71.90%). The Southside Mall area was the first choice for hardware/home improvement by females (89.07%) and males found the Southside Mall area best for groceries (92.28%).
- In terms of needed store types females would most like to see more clothing stores (70.06%) and males would like to see more restaurants (61.62%).

Downtown Customer Survey – Tabulation and Analysis

QUESTION #17: Are You a College Student?

Answer Options	Response Percent	Response Count
Yes	13.3%	140
No	86.7%	913
	answered question	1053
	skipped question	279



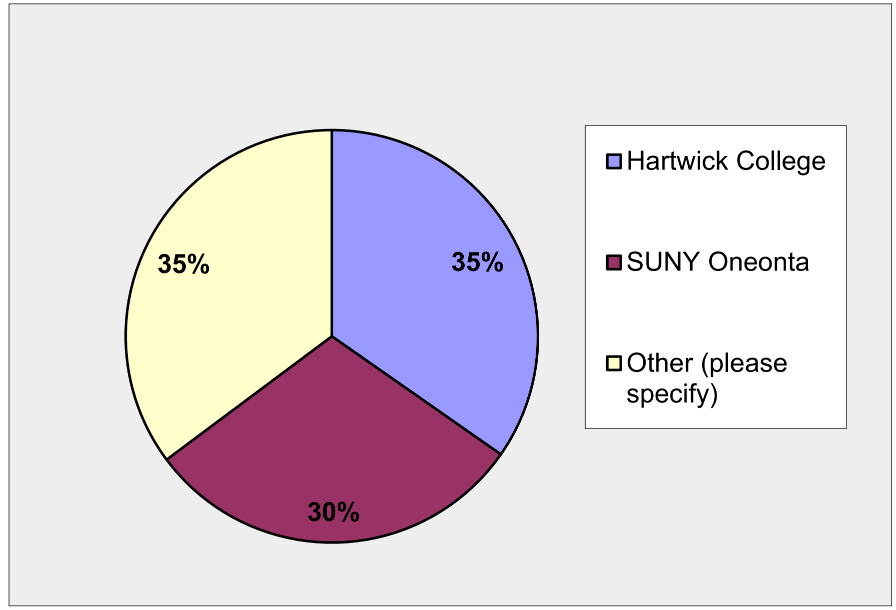
NOTE: The summary analysis for Question #17 is found on the next page.

Summary Analysis of Question #17:

- According to the 2010-2014 American Community Survey as published by the US Census Bureau the 15-24 age cohort represents 3,060 persons or 22% of the City's total population of 13,901 persons in 2014. This fundamentally explains some of the reduced participation from college students. As a survey targeting consumers it is expected that the year-round resident will be more likely to participate as a consumer that identifies with the local market area throughout the year. College students are more likely to identify with a market area in their hometown and are therefore less likely to participate in a consumer survey for city in which they attend college.
- Student respondents have mostly frequented downtown today or yesterday (35.71%) or within the last week (36.43%) for a total of 72.14% between the two response choices; non-student respondents frequent downtown slightly less often: Today or yesterday (35.6%) or within the last week (33.41%) for a total of 69.01% for the two response choices.
- Both students and non-students primarily come to downtown to dine – student response for this option was at 91.43% while 72.73% of non-students indicated they come for dining.
- Both students and non-students would like to see a greater variety of stores – students (93.57%) and non-students (94.74%).
- Among the choices of venues (Southside Mall area, Norwich, etc.) downtown received the highest marks for dining out from both groups – students (75.36%) and no-students (67.64%). The Southside Mall area was the first choice for hardware/home improvement by non-students (90.09%), while students found the Southside Mall area best for groceries (89.86%).
- In terms of needed store types both groups would most like to see more clothing stores – students (75%) and non-students (64.95%).

QUESTION #17a: If You Are a College Student, Which College Do You Attend?

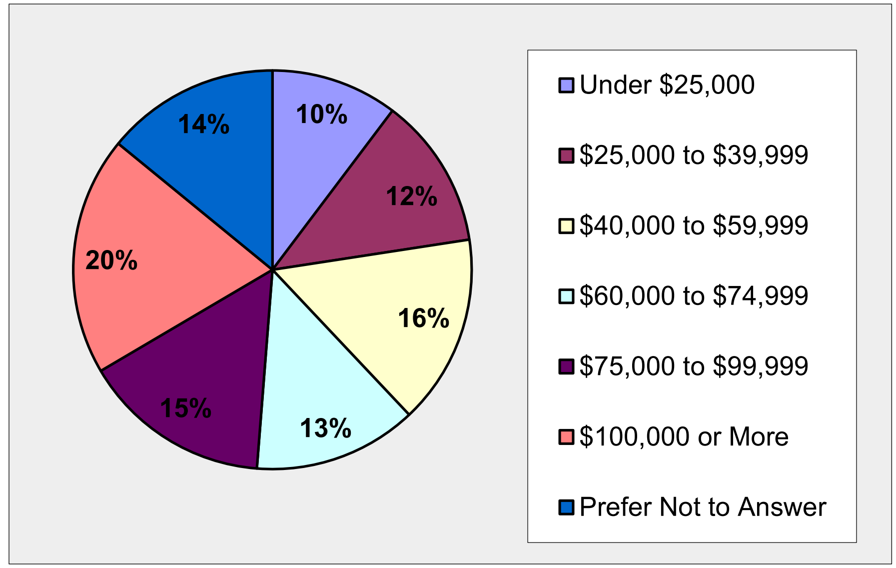
Answer Options	Response Percent	Response Count
Hartwick College	34.7%	61
SUNY Oneonta	30.1%	53
Other (please specify)	35.2%	62
	answered question	**176**
	skipped question	**1156**



Summary Analysis of Question #17a: The remarkably uniform rate of response among the in-city colleges and other colleges is somewhat surprising on two levels: First, the enrollment at SUNY Oneonta is more than three times (approximately 5,900 students at SUNY Oneonta compared to approximately 1,500 at Hartwick). On that basis, one would expect the response count from SUNY Oneonta to be noticeably higher than that of Hartwick. This expectation assumes even exposure and awareness of the survey among the two student bodies. Secondly, the participation rate among students from other colleges being the same as or greater than the two in-city colleges is somewhat surprising.

QUESTION #18: In Which Category Does Your Household's Total Annual Income Fall?

Answer Options	Response Percent	Response Count
Under $25,000	10.3%	108
$25,000 to $39,999	12.3%	130
$40,000 to $59,999	15.4%	162
$60,000 to $74,999	13.3%	140
$75,000 to $99,999	15.3%	161
$100,000 or More	19.4%	204
Prefer Not to Answer	14.1%	148
	answered question	**1053**
	skipped question	**279**



Summary Analysis of Question #18: According to the 2010-2014 American Community Survey as published by the US Census Bureau the median household income for the City of Oneonta in 2014 was $38,034. The income range among respondents is consistent with this basic income metric. Furthermore, the spread of respondents across the income spectrum is fairly uniform among the range of income levels as specified. This would suggest commonality of response among the individual income groups.

Downtown Customer Survey – Tabulation and Analysis

SUMMARY ANALYSIS

The following list highlights the “take-aways” from the responses from the Downtown Customer Survey:

- Downtown Oneonta continues to be viewed as a primary source for goods and services. The depth of this perception varies with the specific goods or services sought and there appears to room make gains in the variety of goods that can be accessed in the downtown area. The clear strengths of downtown rests with heritage of the area as the recognized center of the community and the mixture of goods and services found there. A strategy for future development should reinforce and build upon these strengths.
- The responses indicate clear desire for improved variety among the goods offered in the downtown area.
- As the variety of goods offered is considered emphasis should be placed on *quality*. Quality can be a key element that provides builds a positive reputation for the downtown business community as a whole both within the local and the wider region.
- In addition to the basic strengths noted above the respondents made note of the comparatively better customer service that is experienced when accessing goods and services in downtown. This is a key and distinguishing attribute that needs to be continued and expanded upon. Consideration should be given to featuring this distinguishing feature in advertisement and marketing programs that seek to promote the downtown area.
- Regarding dining; the responses indicate that the customers within the market recognize and enjoy the increase in the number of restaurants and the food choices offered. In addition these customers are desirous of additional restaurants and further expanded food choices.
- As consideration is given to reinforcing the mixture and diversity of the land use pattern in the downtown area, the continued expansion of permanent residential use for year-round residents should continue to be emphasized and expanded. Recent success with rehabilitation of upper floors for permanent, year-round housing has been well-received and is producing positive results for downtown businesses. The conversion of upper floor space to permanent, year-round housing may be further advanced in light of the recent construction of dedicated student housing outside of the downtown area.
- The quality of interior store presentations were noted as a positive while the exterior building appearances were noted as a detraction. Downtown Oneonta has had success accessing funding programs which provide assistance with exterior rehabilitation. In light of the responses received these efforts need to continue under a strategic effort that focuses on those buildings displaying the greatest need.

Appendix A

Verbatim, Open-ended Responses for:

- Question #2
- Question #3
- Question #9
- Question #10
- Question #11
- Question #12
- Question #17a

Downtown Customer Survey – Tabulation and Analysis

Open Ended Responses to Question #2

Downtown Customer Survey – Tabulation and Analysis

Question #2: If You Have Never Visited or Rarely Visit Downtown Oneonta, What Are the Reasons?

Text Analysis – Showing 23 Words or Phrases:

	Other Responses:
1	There nearly everyday
2	O
3	I visit at least 2 times a month
4	Has some rough looking people hanging out
5	not worth the trip
6	Within 3 months of doing business downtown Oneonta I received 2 parking tickets for over an hr. One for Hair dresser, one for Autumn Cafe...When there were meters I never received tickets so no longer will shop or eat downtown will go over to Southside where I never get a ticket. You saying you have free parking is a lie...You just get more revenue by handing out $20 tickets...!!!!!!!!!!!!!
7	Not sure what shops, stores and restaurants are there
8	Visit frequently

Downtown Customer Survey – Tabulation and Analysis

9	not a shopper, don't eat out
10	It seems to me the stores are open for the owners convenience not the shoppers
11	Once you enter city limits, it is necessary to drive as of you are driving a slalom course, because Oneonta is obviously unable to pave a road with manhole covers level with the road surface. Downtown is overrun with hoodlums loitering day and night on city benches, and as the sun sets, it's overrun with intoxicated students. Main street is way too narrow to allow parking on both sides.
12	black gangsta dope dealers
13	It's just out of the way now that I don't live there. Not too far to travel though as I only live a mile away.
14	Busy. Jobs not located on Main.
15	Walking
16	I tend to go to Cobleskill because stores there are less busy.
17	no transportation that is suitable
18	Obnoxious and disrespectful college kids
19	I do
20	My husband and I work out of town and the stores close before we get home.
21	I would eat downtown more, but we need more outdoor seating.
22	shit politics
23	Who wants to go shopping in an area that has so little to offer
24	I live downstate, visit family in Oneonta few times annually ... love it, free parking, love the Vynl Vault.
25	No reason…except its cold in the winter! ;)
26	Just don't think of it
27	Born and raised there ,
28	Bringing a Walmart to Oneonta was the death of Main St.
29	We are lacking a pharmacy, family grocery-hardware, One (not 20like Cooperstown) baseball store. To draw the local merchants more retail stores are needed.
30	Born and raised here
31	cost of parking

Downtown Customer Survey – Tabulation and Analysis

32	Disgusting Tattoo Parlors And Body Piercing ...I would not spend a dime there ...
33	Very busy working from home and being frugal by not going out as much.
34	None
35	out of state for 10 years
36	Too many people walking in the middle of the road and are rude because they don't use cross walks.
37	Hard to find parking when special events happening
38	this question is strange If you visit down town why is there not positive feed back
39	I would be there often if I lived back in O area
40	service is not always good or friendly
41	Oneonta is my home town but I live in Massachusetts now
42	I'm too lazy
43	Now live out of state
44	temporarily living in different city
45	Have not found parking on special events
46	Bad Language of loud people/ loiterers
47	Only visit when passing through
48	mostly coffee shops and restaurants
49	I used to live there but live in Alaska now.
50	need more stores like Bressee's [sp]
51	All parking should be free
52	also when you park the city goes out of their way to issue tickets
53	Parking stinks and parking regulations are not long enough to be able to shop. You are your own worst enemy
54	I don't live in the City anymore
55	First, the CITY needs to fix the numerous exposed MAN HOLE COVERS. Driving down MAIN ST is an accident waiting to happen. Numerous times I have witnessed vehicles trying to avoid these hazards. Another issue, MARKET ST which is in the center city and yet, it has not been

Downtown Customer Survey – Tabulation and Analysis

	touched in YEARS. NO GROCERY STORE, with the college students and the baseball camps, why the city has no store is on my belief. Nothing will change; it hasn't in the past 30 years. It's becoming a ghost town, but we will open more BARS and MORE PIZZARIE businesses instead of the everyday basic necessities. Keep up the GOOD WORK.
56	I live on Southside and rarely have a need to go over there.
57	Dietz street pk lot is set up for getting ticketed 2 hrs. 4 hrs. No rhyme or reason, unsafe walking across street, needs a mid-priced luncheonette. Clothes stores for women not teens or elderly. Some stores too expensive, quality is poor.
58	Not many local families on the Main Street.
59	people not that friendly
60	There aren't many things to do/see there. It’s mostly restaurants or bars......
61	Work
62	There simply just not enough stores to browse in like the old days.
63	There is nothing there.
64	Limited shipping options. I live close and walk. The city is not as safe as it used to be. I won't walk alone in certain areas or at night.
65	bus hours are not convenient
66	my health
67	Hard to get my handicapped grandmother in and out of cars with the limited handicapped parking on the street
68	Graduated and unfortunately had to leave town
69	neither
70	I live out of state. visit to see family
71	Massive drug sales area/unsafe
72	The bars and the very disrespectful people that like to start fights.
73	Drugs and drunk people
74	I do travel there
75	I currently live in California.
76	no attraction/too many tattoo parlors
77	Visiting family

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Downtown Customer Survey – Tabulation and Analysis

78	Not in area often
79	I'm not back home that often. When I am I visit friends
80	Sometimes I just Don't feel like waiting on all the traffic to cross the street, there's many times I would have loved too shop in stores on Main Street, but Give up on it when I see all the traffic
81	bars are sometimes annoying and expensive... other times not
82	Don't go to college there anymore
83	Don't travel down there
84	Puke. Every time I visit down town I find a pile of puke, and or dog shit. The parking garage smells of piss and you have to dodge the puke. Basically it's the collage kids that keep me out. I'm only in my 30s
85	Please get rid of the crackheads and heroin addicts roaming the town
86	It's not on my daily route home
87	I am tired of getting parking tickets. Free parking at the mall.
88	I'm a regular visitor
89	I've been there many times
90	College kids
91	Too much gears towards college kids
92	Got a few parking tickets.
93	I was raised in Oneonta so when I visit I am always downtown
94	Get rid of tattoo parlors
95	I've moved away
96	Needs some outlet stores! Similar to Freeport Maine. Would me awesome!!!
97	I miss Steven's
98	Moved away but luv coming back to visit Oneonta
99	Moved out of town for school
100	prices are not over the top expensive, but budget doesn't always allow for local shopping
101	crossing the street

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Downtown Customer Survey – Tabulation and Analysis

102	I work 5:45am to 7:30 pm 2 jobs so not stores fault. Also would shop more if for not all the vacancies. Lower store fronts rents would fill vacancies. Java Island for example empty for years as is karma's old location. Need things we don't have, have all the restaurants we need. Use one for year round farmers market for example or every week end flea market. Great use of space till fully rented.
103	Food and restaurants are amazing. Not interested in any of the stores.
104	I go to downtown Oneonta everyday
105	there is nothing really to do on Main Street and no real businesses that stick around, so why waste the trip
106	Businesses close too early/not open on weekends. Not much variety.
107	Life is busy!
108	I'm there all the time
109	Wheelchair use is hard due to too many bumps in sidewalk and curbs being too high. I can't go alone a lot of store door thresholds are not passable without help.
110	Not enough variety, I have been to the same stores a lot
111	Difficult to drive down Main St when cars are trying to park
112	I visit when I am in town to visit family.
113	Clean empty storefronts to be more attractive-WASH WINDOWS!!
114	Too many Mexicans
115	been long time since I shopped downtown but I have driven thru Main Street
116	Many of the stores are not open late enough
117	no desire unless getting food
118	Needs more cleaning up of empty store fronts
119	Too many tattoo, pizza, head shops for me.
120	I visit at least once a week to eat or to shop
121	Too many businesses cater solely to students not families.
122	I go often
123	Not a strong consumer
124	Main Street is so narrow for travel.

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Downtown Customer Survey – Tabulation and Analysis

125	Difficult to get around
126	I do go downtown
127	I'm not a big shopper. Went to Holiday parade and will go to tree lighting and eat supper at Simply Thai
128	Don't get out that much
129	Parking limit is one hour on Main Street. It should be two hours or put meters back. You can't even have lunch in an hour.
130	parking not convenient for elderly with walking problems

Open Ended Responses to Question #3

Downtown Customer Survey – Tabulation and Analysis

Question #3: When You Come to Downtown Oneonta, What Are the Usual Reasons for Your Trip?

Text Analysis – Showing 27 Words or Phrases:

	Other Responses:
1	Coffee at Latte Lounge
2	Go to bar
3	College
4	Farmers Market
5	Volunteer at Catholic Charities
6	Night out at local Bars
7	OWL'S nest, children's activities like the YMCA

Downtown Customer Survey – Tabulation and Analysis

8	Hair dresser but will no longer do because of poor parking...I have to walk all the way from Ford Ave or Dietz street to make sure find over an hr. parking...Ridiculous!!!!!!!!!
9	daughter just graduated from SUNY Oneonta
10	It is also a nice place just to go for a walk or ride a bike for exercise
11	Fitness
12	School
13	Meetings for groups I volunteer with
14	I try not to. But if o do is for something I can't buy in the town of Oneonta. I refuse to support wasteful spending. i.e. Hiring an out of state artist for a staggering amount to write "life enjoyed" in cursive. We have 2 universities with awesome at departments not to mention public schools.
15	visit friends
16	Walking
17	Taking my 2 toddler granddaughters to OWL
18	Walking
19	gym
20	Bars
21	See friends
22	Owl
23	Bars
24	Coffee
25	Gas station
26	Piano lessons
27	Sal's pizza!
28	business
29	Farmers Market
30	Bars
31	mental health appts for my children

Downtown Customer Survey – Tabulation and Analysis

32	visit college student
33	visit family
34	Laundry
35	Walk with the kids
36	OWL's nest
37	I drive through it for work
38	YMCA
39	Bar
40	Temple
41	post office
42	Bars
43	Lunch because I work on Main Street.
44	Volunteer at the Hospice Thrift Shop
45	Bars
46	None
47	Commit2fitness gym
48	Walk to work. Walk to exercise. Save on gas and car.
49	Ambiance of a small town/city
50	Just driving thru.
51	I am a regular customer at scoville-meno honda, get my haircut west end barbershop
52	YMCA
53	Visiting friends and family, I only drive through.
54	everything
55	PROSTITUTES!

Downtown Customer Survey – Tabulation and Analysis

56	Farmer's Market
57	Restaurants and food
58	cross town to get to mall
59	To enjoy the Green Earth, Oneonta's community center.
60	Farmers Market
61	Salvation Army
62	drinking with friends
63	Running and coffee
64	just for fun
65	Pizza
66	Participate in Guiding Eyes for the Blind puppy training at St. James Episcopal Church.
67	Owls nest
68	Breed fitness
69	Bars/nightlife
70	Drinking
71	love to walk the street to see what's new
72	Exercise (walking), Farmers Market
73	visit radio stations
74	Coffee at Latte Lounge
75	Coffee stop and meetings
76	Walking/exercise
77	dog groomer
78	Downtown family events
79	The PARK, which is another issue.

Downtown Customer Survey – Tabulation and Analysis

80	Bar to play pool
81	Usually drive thru.
82	Trying to find something to do with visiting family and friends.
83	Meeting someone for lunch
84	music and socially drinking beer
85	Visiting town
86	Walking and shopping in the stores
87	Parents house
88	Get lunch/coffee.
89	Everything. Try to do all my business and please local. But very hard to do
90	Convenience stores/gas/dollar general/drug stores
91	The BARS
92	visit family
93	Oneonta world of learning, farmers' market
94	Bars
95	owl
96	BARS
97	Sal’s
98	Night life
99	Bar
100	the clarion
101	Work related, but do not work in Oneonta
102	Drinking
103	Bars

Downtown Customer Survey – Tabulation and Analysis

104	Visit friends
105	coffee with friends at Latte lounge
106	I try not to.
107	used to own a home on Church Street, sold 2 years ago
108	just walking
109	Bars
110	Volunteering
111	Passing through
112	Dance class
113	Bars
114	Farmer's market, to see people
115	It is an excellent base of operations for my annual Mountain Biking vacation
116	Bars
117	bars
118	ballet classes
119	Bars
120	Bars
121	Bar
122	Wander Main St and random shop
123	nightlife (bars)
124	Bars
125	bars
126	Bar
127	Nightlife

Downtown Customer Survey – Tabulation and Analysis

128	Traveling through
129	Bars
130	Food
131	Fabulous Fridays
132	Get hammered.
133	Farmer's Market, Bars/Concerts
134	Parades
135	Bars
136	bars
137	Bars
138	Family
139	Own a downtown business
140	night life
141	Socialize
142	farmers market
143	alumni event at a bar
144	Bars
145	Bars
146	Drinking
147	Bar
148	Cup of coffee
149	To drink!
150	Night life
151	Bars

Downtown Customer Survey – Tabulation and Analysis

152	Dentist
153	or a free afternoon on a nice day
154	YMCA
155	Oneonta World of Learning OWL
156	Bars
157	Bars
158	walk, Art ware, Farmers Market, haircut
159	Coffee
160	I live in NJ and I stay at the clarion Hotel when I come to town to visit my mom
161	need to get away from my small town
162	Walking
163	Oneonta Theatre for shows, sorry but way better line ups then foothills.
164	Visit the OWL Nest, work meetings over coffee
165	walking
166	social activities
167	Going out on weekends
168	History Center
169	OWL
170	Dance class
171	my business is there
172	X work at, or drop work off at The Artisans Guild
173	To eat
174	Bars
175	Meet up with old friends for a drink or two

Downtown Customer Survey – Tabulation and Analysis

176	Coffee
177	Business meetings
178	Just to walk around and meet people
179	Son goes to Oneonta Taekwondo
180	kids have music lessons
181	poor parking options
182	Get black out drunk
183	the farmers market
184	Dance class
185	Fitness classes/running and coffee
186	parade
187	drive thru
188	child's classes
189	Trick or Treating
190	Oneonta World of Learning 2-4x per week
191	Just driving through!
192	first Friday events parades etc.
193	Child dance classes
194	Attend business meetings
195	YMCA
196	Roots
197	Meetings
198	Car repair
199	Coffee stop

Downtown Customer Survey – Tabulation and Analysis

200	for business meetings or luncheons

Open Ended Responses to Question #9

Downtown Customer Survey – Tabulation and Analysis

Question #9: What Times Would You Prefer Downtown Oneonta Shops to be Open?

Text Analysis – Showing 21 Words or Phrases:

	Other Responses:
1	10 to 5
2	Okay now
3	I am retired so I am free to come any time....and it varies a great deal
4	Current hours are fine.
5	what available is fine
6	If you have to leave town early for work most places are closed when you return.
7	none
8	I liked the extended hours on Thursdays but you need either a big anchor or many more small stores

Downtown Customer Survey – Tabulation and Analysis

9	Want the wine store to be open when the Farmers Market is.
10	early evening
11	I have no problem with the current hours.
12	Doesn't matter. There is plenty of opportunity to shop.
13	Consistent store hours throughout... everyone is on their own schedule
14	Nothing will bring people in any more. They want to shop at Southside. The questions in the survey are not the answer. Bringing senior living into the upper level apartments will do the trick. If they live there, they will want to stroll, shop and enjoy their area.
15	It would be nice if some stories like the Green Toad were open on Sundays
16	I like the current hours shops are open.
17	hours are my biggest complaint...they feel Southside is their problem...no its not...south can't compete w. downtown one on one service, uniqueness of items carried that personnel touch
18	Sundays
19	times are good for me
20	Weekends -- it is maddening how many stores are closed Sunday.
21	Whenever.
22	Doesn't matter
23	21
24	Open Mondays
25	??
26	04/06/2016
27	And all week days for those of us that work downtown.
28	restraints open on Sunday and shops
29	I work 2nd shift. All my shopping of any kind has to be done before 2:30pm.
30	Who made this survey? The close ended questions are not mutually exclusive and some answers appear more than once. Seriously did someone's brother get the contract to consult for the city? There are two universities in this town. You couldn't find a prof or a student to create a decent survey?
31	Sundays in summer

Downtown Customer Survey – Tabulation and Analysis

32	I would love for the store to have consistent hours and accommodate people that work during the day by offering at least two evenings a week to shop.
33	Sunday
34	Sundays
35	Sundays
36	The times they have now are fine.
37	Hours aren't a problem...
38	this survey is not easy to fill
39	Thursday nights are fine.
40	a little later in the evening but not until 9
41	Use to love the late night shopping on Thursday evenings years ago
42	Thursday evenings is a good tradition
43	No request
44	flex times
45	Sundays!
46	The times now are fine
47	no preference
48	Current times are fine with me.
49	8AM but 9AM if there is a problem with that ... cause 10am is lame
50	Sunday afternoon
51	More than 1 hour oaring
52	No opinion
53	same
54	fine as is for me
55	Depends on store

56	I think that the times are fine as is.
57	hours open are fine
58	Normal business hours
59	Sundays
60	does not matter
61	Sunday
62	This should be unique to shop owners
63	Sundays and Mondays
64	None but you wouldn't let me leave it blank
65	Used to love Thursday nights
66	Sundays
67	Times now are fine.
68	Always liked the Thursday night shops opened late. But there is nothing on main street anymore worth going to at night.
69	sat & sun
70	we're still wanting the old Thursdays at Bresee's, but realize that will never happen again
71	Open late one night of the week like Thursdays
72	Sundays
73	later
74	Sundays
75	N/A
76	Sundays
77	Sundays!
78	no other
79	day

Downtown Customer Survey – Tabulation and Analysis

80	The times work for me
81	afternoon, between 3-6
82	Never. Close them all down and make a big parking lot. Get rid of Bim Muller plaza. People go to malls.
83	hours are ok
84	no opinion
85	Sunday
86	Sunday afternoons
87	More Sundays/Mondays
88	not sure
89	Anytime is fine
90	The later the better. I would open at 1pm and close at 9pm if I owned anything. I'm in school all day and people work all day. If a restaurant you'd have to be open for lunch so I guess 10 or 11am open time if it was that.
91	Some stores are closed at inconvenient times during the weekend
92	After class
93	Sunday. The town is closed on Sunday. Not every person in town is a white haired bible thumper
94	Doesn’t matter, as I avoid downtown if at all possible!
95	all day
96	09/07/2016
97	Sunday
98	10/07/2016
99	Sundays
100	Late-night Thursdays should be returned.
101	no new preference
102	Sunday's. That's when my husband and I shop.
103	It doesn't matter

Downtown Customer Survey – Tabulation and Analysis

104	Sunday!!!
105	Considering the atmosphere I don't blame shops for closing early! After dark I don't want to be in Oneonta!
106	Sunday
107	hours are fine
108	Wider variety of shops
109	weeknight hours would be helpful once a week at least
110	Sundays
111	Mondays
112	I shop during lunch hour
113	remember Thursday night shopping on main street and dinner
114	Many shops are closed more than one or two days a week.
115	?
116	No opinion
117	Occasionally, more night time outings/entertainment
118	Later. Until midnight
119	6 or 7
120	Current hours have to be adequate. You cannot expect store owners to extend their evening hours unless business warrants it. So sad this past Saturday (small business day) seeing all the stores without customers shopping
121	It would be nice to shop downtown after you've had dinner. Sundays would be great also; people go to church in the morning and catch lunch afterwards. It would be nice to do some shopping while they're out as well. Maybe 11-4 on Sundays.
122	doesn't matter
123	When the Mexicans aren't out
124	open later close later
125	Sundays
126	hours are ok now
127	Thurs eve like in the old days

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Downtown Customer Survey – Tabulation and Analysis

128	It should be an eco-system where all business thrives off each other during similar hours thus giving people multiple reasons to go downtown rather than one or two. I.e. South side. A tattoo parlor next to a craft store next to a shoe store just doesn't cut it anymore. It's the same theory with strip malls.
129	12/05/2016
130	Thursday evening
131	Evenings if the students were not presenting a perceived safety issue
132	Would like restaurants to be open later and 7 days a week
133	open later on Sat and open Sun
134	doesn't matter to me
135	Open on Thursday nights.
136	till 7 would be great
137	as is
138	Regular hours during the week, late on weekends
139	The hours are fine
140	10/07/2016
141	Current hours are adequate.

Open Ended Responses to Question #10

Downtown Customer Survey – Tabulation and Analysis

Question #10: Below is a List of Different Types of Products and Services. For each one, choose the column that indicates where you primarily shop for or obtain the good or service.

Text Analysis – Showing 25 Words or Phrases:

	Other Responses:
1	Binghamton
2	town
3	East end Oneonta; Albany or Binghamton; Sears also in Binghamton; West end Oneonta; Stella Luna's Bella Michaels
4	Price Chopper
5	price chopper
6	East end; Alfresco Panera
7	Price Chopper; Undercover Egg Plant; YMCA
8	Fox Care

Downtown Customer Survey – Tabulation and Analysis

9	Fox Care; Delhi
10	Price Chopper; Home Depot; Albany; Pine Shop; Dicks; Green Toad; TJ Maxx; Principally Print; Karma Spa; Mane St.; Sal's B-Side
11	Price Chopper; Home Depot; Foxcare; Chestnut
12	Binghamton/Albany/Utica
13	Price Chopper
14	Town of Oneonta restaurant farmhouse
15	Dining out...both downtown and Southside probably equal
16	We need something between high end and consignment. Very boring choices. Think Clinton, NY and even though pricy think Skaneateles in finger lakes. Not boring there.
17	Dining out-New Berlin
18	Most of these things I do "none of the above."
19	Farmers Market
20	For clothing need to go to Binghamton for men's wear
21	Furniture-Albany or Binghamton
22	Groceries -Price Chopper, downtown is more suitable for boutique shops. Big necessities will never work down there anymore. Think seniors. Think boutiques. Small delicatessens, senior clothes, CHANGE THE FOCUS
23	Groceries-Price Chopper. Mall trips-Albany
24	You did not include East End as a category... That is where I do most of my grocery shopping.
25	Also Brooks for takeout
26	Dining Binghamton
27	I shop for used furniture and antiques all over NY. Oneonta makes places little emphasis on their resources in re-sale furniture and antiques. This is an additional potential customer market waiting to be tapped. It could bring people to Oneonta.
28	I always do banking in downtown Oneonta. The bicycle store in downtown Oneonta is great too.
29	Drive to Albany or Binghamton to make purchases.
30	you did not include east end of Oneonta in your choices
31	Local artisan-downtown

Downtown Customer Survey – Tabulation and Analysis

32	Binghamton and Albany
33	Normally most of these would be Albany or Binghamton.
34	Mostly go to Binghamton for many of these but not listed as an option. We would like to shop local but find it hard here
35	You need an "other" category. I find clothes, furniture, etc., elsewhere in the area. Also a "none of the above" option, as I do not buy fast food or beauty services.
36	I usually do grocery shopping at Price Chopper and everything else in Binghamton or Albany.
37	What about shops on the east end & west end of Oneonta?
38	Shop in Binghamton as well
39	Toy store -downtown
40	Utica, Binghamton, Albany for box stores
41	Out of town
42	I travel for work so generally shop in Vestal or Utica areas for everything. but if I do shop in Oneonta I selected where above
43	I use price chopper to shop, shop mostly out of town for clothes
44	You should have a column here for Other/City. I do most of my shopping in Albany, Binghamton, or Utica for clothing, craft supplies, books, etc.
45	most item bought in stores are farther away like Binghamton and Albany
46	groceries--Emmons; clothing and home furnishings--Albany
47	Fitness-downtown (breed)
48	I like to go to Binghamton for a lot of my shopping. Why isn't this a f--king option???
49	Utica for everything not checked
50	Albany-, Binghamton or Utica-they have much more to offer
51	Albany/Binghamton
52	I obtain my sporting goods in West End of Oneonta, Dining out is usually in the west end of the city also. It would be great to have a craft store on Main St.
53	Dining out mostly in Binghamton or Albany
54	groceries: east end price chopper; restaurants: west end Sloan's

Downtown Customer Survey – Tabulation and Analysis

55	Art, music, culture-downtown
56	Groceries at Price Chopper
57	auto services
58	You need to have N/A & Other options
59	I buy lots of books and craft supplies online
60	I live in Schenectady, lived in Cobleskill 25 years, still work in Cobleskill
61	Albany
62	Choices do not cover all possible shopping locations for listed items.
63	I had to choose Internet as Albany and Binghamton were not given as choices. I wouldn't buy clothes in Oneonta.
64	when I am visiting Oneonta I am mainly in downtown area and sometimes get to Cooperstown
65	East End and West End and bigger cities
66	I buy groceries at Price Chopper-that doesn't fit your categories-also clothing- you need an "other" category for example I shop in Albany for a lot of stuff
67	Albany and Binghamton
68	Fox Care Center for medical Binghamton or Albany for most things
69	shop mostly in larger cities
70	Shop for clothing and furniture in Albany or Binghamton
71	West Oneonta
72	Need a family style restaurant. Norwich has two. Not chains or Pizza
73	East end, West end, other metro areas
74	We go to Utica for most shopping i.e. Bass Pro Shops, Hobby Lobby, Toys-R-Us, better mall
75	Footwear, Downtown
76	Need to provide an NA on this question
77	movies (rentals or cinema)
78	Will travel to Albany and Binghamton for clothing and craft/hobby selections

Downtown Customer Survey – Tabulation and Analysis

79	Bad survey design. What about shopping in Binghamton, Albany or NYC? Also, you made choices all or nothing. E.g., some clothing we buy on Southside, some we buy in Albany.
80	West End, West Oneonta-less traffic (fast food/takeout, hair/nail/beauty services)
81	do most of my shopping in Margaretville
82	green earth health food store, farmers market
83	Binghamton and east end and west end
84	The toy store, book store, and thrift stores are great! I try to shop there as often as possible. Additionally, there is no column here for n/a. I don't shop the internet for hair services or fast food-- they are not important to me.
85	Medical Services-East End (FoxCare)
86	These categories are useless, Where in the city is a legit grocery store.
87	Need an Albany and other selection
88	Binghamton. Albany
89	Work in Sidney and shop in Sidney
90	There is a missing column. I think it would have been valuable to know what goods and services are being purchased out of town in Albany/Binghamton/Utica
91	East End-Price Chopper, Best Wine & Spirits, also Albany
92	You did not give enough selections (Albany, not applicable, town of Oneonta etc.)
93	what about east end and west end
94	clubs and dancing/drinking
95	You left out the East End of Town
96	I live in Delhi so I do most of the shopping there
97	need to have Albany and Binghamton on the list--that's where most women with any money shop for clothes
98	Norwich is actually Utica for me, but that option wasn't there.
99	East End
100	Children's toys and local products-downtown Oneonta
101	We weekly travel to Utica, Binghamton, or Albany for better dining options

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Downtown Customer Survey – Tabulation and Analysis

102	fitness-downtown
103	Binghamton or Albany for clothing and Hobby Supplies
104	Downtown has cute little niche stores that have different items, like Artisans Guild.
105	Binghamton
106	It varies but not too much downtown Oneonta
107	Malls
108	Binghamton
109	east end, Albany
110	Groceries-Price Chopper
111	Banking: Downtown
112	Binghamton and Albany is where we do most shopping, after internet
113	bars
114	Walking outside and strolling through town for window shopping
115	I use urgent care on river road. I get my hair cut at home the breaks permit me to do so.
116	Antiques and Vintage-Downtown
117	I get medical care in Ithaca and lots of things in Albany I checked Internet for those
118	You need another column that says "Out of Town" and another that says "Elsewhere"
119	Home furnishings purchased in Binghamton or online. Our stores here are extremely limited in diversity; we need to bring in other stores.
120	Binghamton, Albany, and Utica are visited more often for shopping and dining
121	Binghamton, Albany, Delhi
122	Drive to Albany, Binghamton or Utica for clothes, kids' stuff or Christmas shopping
123	Art supplies in downtown Oneonta.
124	Delhi
125	Sidney, Utica area, and Binghamton area for clothes, sporting goods, and lots of other things.

Downtown Customer Survey – Tabulation and Analysis

126	Auto
127	East End and West End
128	my barber closed downtown too
129	If this had more than 3 columns I couldn't view them. I do a lot of clothing, gift, and hobby shopping online because the goods aren't available here at all.
130	Price Chopper, Annutto's, Fox Care
131	I shop local if possible but since I live in a different town I try to shop my local
132	Binghamton
133	bicycles
134	We go to Binghamton or Albany for major shopping.
135	Albany (or other) should be a choice.
136	Travel to Binghamton for medical, shopping
137	The choices you give do not cover where I buy things
138	fitness/workout and health food in downtown
139	Food is Price Chopper Primarily, not an option here so not really Southside. Not a fan of Hanny and have never spent a penny in Walmart out of principal.
140	There is no choice for this, but most of my medical needs are done in the town of Oneonta not Downtown. I would like to see a greater variety of eating options and price ranges in Downtown. Right now most seem targeted towards upper middle class and college students, which leave out a lot of residents.
141	pizza-downtown
142	if the rents were so overpriced on Main Street we would have decent businesses, but the landlords are quick to want to rip off the tenants instead of trying to get them to stay
143	Your options don't include stores in other parts of town (East or West End), or more distant options such as Binghamton/Albany
144	Price Chopper/Fox Care
145	dining out choice includes Chestnut Street restaurants
146	I own a salon downtown Oneonta. I shop in Albany every two weeks for my salon. While there I head to Shoprite to buy all my meat and groceries. Then I head to the mall/craft stores, and Target.
147	takeout food-west end
148	there should be an "other option" here, often we go to Binghamton or Albany or other areas of Oneonta, not just Southside

Downtown Customer Survey – Tabulation and Analysis

149	All there is Pizza, pizza, pizza and NO public bathrooms!
150	Binghamton
151	Please check out Savannah Georgia's downtown district. How they converted dead space.
152	banking and coffee shops down town
153	Exercise class
154	Grab pizza 2-3 times a week downtown
155	Probably should be an Other category. I shop for groceries primarily on the East side (price chopper) and use medical services on River St.
156	Banking, Farmer's market
157	wine shop -downtown
158	east end
159	Binghamton and Albany: much better variety and selection
160	Price Chopper,
161	Why did you neglect the east of Oneonta? I get groceries and frequent restaurants there. I get my hair done in the River St area
162	Downtown Oneonta does not have a grocery store.

Downtown Customer Survey – Tabulation and Analysis

Open Ended Responses to Question #11

Downtown Customer Survey – Tabulation and Analysis

Question #11: If Downtown Oneonta Added New Stores, Which Types Would Attract You to Shop in Downtown more Often?

Text Analysis – Showing 28 Words or Phrases:

	Other Responses:
1	Card and gift shop
2	Bakery
3	Clothing alterations, shoe repair
4	Deli; move visible and attractive visitor center with post cards of area
5	Gift Store
6	Bakery; fewer coffee shops
7	?
8	Oneonta already has an excellent Art/Framing/Craft supply store
9	Omaha Steaks, shoes –McLaughlin's is boring and expensive. More vibrant choices. Nine West, other brands. Florist. Cooking class restaurant options. Less tattoo shops.

Downtown Customer Survey – Tabulation and Analysis

10	Hallmark shop with other gifts like Hummel's in Herkimer
11	ice cream/soda shop with grill cheese sandwiches
12	galleries art studios antique stores
13	gifts
14	Anything
15	convenience store
16	Ice Cream parlor that is accessible
17	A grocery store would be wonderful
18	Seniors who live there would want coffee shops, luncheon places, women's clothing, magazines, gift shops and galleries
19	We have a college population of education students, teachers and artists that might enjoy access to a crafts store like something like Michaels. We have an increasing tenant population on Main street that is a mix of elderly and busy professional people. An early bird special for seniors at some of the restaurants might attract additional business if people could get their meals and get home before the streets fill with students.
20	Small "boutique like" shops. (Not high end necessarily)
21	no opinion
22	I really don't see myself going to downtown for any of those. It's too much of a hassle dealing with parking and drunk college kids
23	Electronics.....Arcade/restaurant
24	Gift
25	DINER-24 hours
26	Other than Italian restaurants please. We have enough of those
27	AC MOORE or MICHAEL'S and KHOLS
28	a place for kids, Chuckie cheese or discovery zone
29	You have a typo in "stationery"
30	Child of mine. Used baby items
31	Pharmacy
32	make up and perfumes

Downtown Customer Survey – Tabulation and Analysis

33	Kohl's. Target craft stores. Starbucks diner(24) hours
34	Indoor farmers market, breakfast diner open on weekends, stores that offer free wifi/place to hang out
35	McLaughlin's would be great to shop at; however, they do not sell extended sizes.
36	Gift stores/ Art galleries, Home goods
37	dollar store
38	Craft supply
39	fabric and yarn
40	Do not bring anymore shitty chains.
41	Need grocery store in west end for seniors
42	People don't seem to shop door to door anymore. I think most like multi-function stores like Lowe's or Walmart where you can shop for most all things in one place and the prices are reasonable
43	Books, Judaica
44	A craft store would be great. We already have several Art/Framing stores that could use more advertising of the great services they offer.
45	restaurant / wine bar
46	Gift Store
47	High quality paper goods, an Origins or Aveda
48	Gift Shops that are NOT over priced
49	Craft supply
50	more events
51	I
52	Need a big name store to replace Bressee's?
53	drug store
54	entertainment other than college bars
55	Christian Belly Dancing
56	craft store

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Downtown Customer Survey – Tabulation and Analysis

57	Just stores
58	We need a TARGET!!!! Hate Walmart
59	American eagle
60	Fabric/crafts
61	Music, games (look at bull moose in Portland Maine)
62	Target, Outlets would bring people to the area and help tourism
63	Otsego outfitters/sport tech\Stevens?
64	Bring back the stores that were around in the 60's and recreate the atmosphere of yesteryear
65	Bakery
66	Anything kid related
67	Crafts, i.e. Hobby Lobby, Michaels, Joann's
68	something to carry a variety of things
69	movies
70	Starbucks. Cannot believe there isn't one!
71	more than just Walmart and not centered around college students
72	None
73	pet store, holistic medicine doctor, music store
74	No more tattoo parlors and curio shops.
75	Photography supplies/services
76	Pharmacy
77	Indian restaurant
78	Unfortunately the current shops are directed to a small population. Need to have some kind anchor store to lure all types of consumers.
79	Giftware Quality gifts, such as offered by the "pink house" that operated on Rt. 7 several years ago.
80	Card/Gift shop (like "Love of Pete")

Downtown Customer Survey – Tabulation and Analysis

81	Never GOING TO HAPPEN, JUST LIKE THIS SURVEY, A JOKE. The city should have spent its money on something else, like cleaning up MULLER PLAZA; it's an EYE SORE in the SUMMER, especially when you have the people SMOKING and YELLING at their KIDS.
82	Plus sized clothing
83	Drug store
84	mid-priced specialty shops not $$stores or expensive craft of gift shops
85	Hobby-RC Planes/Helicopters
86	It needs stores for the younger kids from High and campus, a department store, it needs a lot. But what it doesn't need is another run down bar, another tat shop, a hoka bar, etc. upgrade the quality of the stores in general.
87	Accessories/card shops/gift shops
88	Target
89	I miss Bresee's, Love of Pete, and Golden Rooster
90	Electronics/entertainment (video games, movies, etc.)
91	I think the variety is diverse enough
92	more variety, less pizza
93	florist
94	More variety in restaurants
95	Expand latte lounge
96	More thrift stores- need Goodwill!
97	Target, Michaels
98	Nothing is going to come here. Stop wasting tax payer's money.
99	mega crafts
100	Comic, Toy and Hobby Store
101	Indian or middle eastern restaurant!
102	Children's clothing
103	bars
104	Anything is fine

105	Shoe stores; all need to price competitively with mall
106	Hobby lobby or Michael's, Joanne's
107	Clothes can't be too expensive. T shirts should be like 10 dollars, Jeans/pants 20.
108	More affordable stores. Most stores (especially clothing and goods) and too expensive
109	Child play zones like OWL
110	Bass Pro Shop yeah right
111	Vintage
112	There are not any children's clothing stores or maternity store combinations. This is a big problem, everyone goes out of town and consumerism here drops.
113	Fewer tattoo parlors
114	Kids' stuff, maternity, baby stuff
115	Electronics/games
116	Drugstore, but no chains downtown please!
117	Please No more restaurants enough already
118	We had those ^^ stores that attracted me, and then they went out of business...
119	Outlets!!!!!!!
120	Need more technology in the area. An open layout office building for entrepreneurs would be nice. We have enough music, art, festivals etc. Need to find a way to keep the students here and you're not going to do that with another Buffalo Wild Wings. If you're going to continue to cater to the "hippie" lifestyle you better have a festival every year that the WORLD will know about.
121	specialty shops, all kinds
122	drug store
123	Indian food, shipping, video games, juice/smoothie
124	As I said before year round flea market/farmer's market in some vacant spaces. Also more help for the theatre to keep its doors open. Movies during the week nights for families and bring the plays back. A hardware store with fair prices would be nice also for convenience but Southside has the edge on that. also a "real" hookah bar would be great. The one that was hear was garbage but a nice legit one for adults would be great.
125	Bakery
126	a kosher deli, Indian restaurant- a Woolworth type store (I hate Walmart) no more Asian or Italian restaurants

Downtown Customer Survey – Tabulation and Analysis

127	Rental stores
128	?
129	A decent home goods department store such as kohl's/target
130	College students are our live blood but we need choices suitable for middle age and older residents
131	Children's stores and activities
132	Enough with Pizzerias, bars and art store. Really! How much pizza can one town eat? How about a nice adult piano/jazz bar?! Enough with the 70's live music stuff. Bring some life to this city, it's to Stagnant!
133	current empty stores need to have clean windows/something hanging-making them more attractive
134	Mexican food without the Mexicans
135	gift stores
136	bigger variety of restaurants and grocery in both downtown and west end of town
137	Music Store
138	Plus size clothing
139	Target on Southside
140	This misses the point. You need to identify the primary district of downtown Oneonta. Restaurants? Bars? Office? Tech? Not a hodgepodge of all the above. Break Oneonta up into districts. Use taxes as a deterrent or as a benefit for those that are in that said district. Have a long term 10-15 year plan. Retain students to generate young professionals between the age of 22 and 35.
141	Card store, less bars, no more pizza places
142	Discount shop
143	Vegan restaurant. Whole foods.
144	Bakery, less expensive clothes
145	drug store-while there are two "close," they still require driving/losing parking spot
146	Reasonably priced, high quality health food store. Not just more restaurants but more diversity would be good
147	National names geared towards young consumers
148	Bakery, home decor
149	Trader Joe's

Downtown Customer Survey – Tabulation and Analysis

150	You used the wrong stationery in this question. Stationary that applies to paper has an "e" in because it is used for a letter. Stationary with an "a" in it means it does not move because it stays in one place.
151	Locally owned
152	Anything that is geared for kids
153	???????????
154	Cafes
155	Something unique. Would love a good Indian restaurant.
156	Shoe store and nice department store

Open Ended Responses to Question #12

Downtown Customer Survey – Tabulation and Analysis

Question #12: What Arts or Entertainment Would Attract You to Downtown Oneonta?

Text Analysis – Showing 24 Words or Phrases:

	Other Responses:
1	Idea: A portable ice hockey rink for downtown during the winter months
2	Yoga and tai chi
3	Innovative cultural (educational events/classes/library services)
4	Not sure-they do a great job now! I think downtown needs to be quaint and old. A nice experience for people to remember and those visiting to come back. Downtown does not need to compete with Southside but be a total different experience based upon aesthetics and quality of goods with a variety of wares. Examples of towns I am talking of: Cazenovia, Skaneateles
5	We need to have an art/film theater (showing at least one night a week). UCCA used to do this.
6	Zumba Classes
7	Downtown needs to be more pedestrian friendly
8	Foothills Performing Arts Center

Downtown Customer Survey – Tabulation and Analysis

9	first class restaurant
10	Opera!
11	Less junk and more outside dining. Needs more visual appeal. Fewer students. Focus their venue away from Main Street. More family and tourist oriented. Sick of tanning and tattoo places. Too many pizza places. Green toad and latte lounge are great. Yellow deli good.
12	Celtic and cape Breton music
13	anything
14	Concerts!
15	Many of us don't go to Foothills because the acoustics need major improvement
16	Put in senior apartments on the upper levels. If you make room for people to live there, the shops will pop up.
17	We have so many talented people here. Regularly scheduled, open to the public, Recitals for students of voice, piano and other instruments would give people a chance to perform publicly, and would give others a chance to enjoy local talent. or for
18	It would be great to have a comedy club in downtown Oneonta. It would also be nice to have a repertory movie cinema that regularly showed old movies.
19	Car shows
20	I would like to see Main Street turned into a pedestrian mall
21	None, time to start weeding out bars.
22	Anything and everything.
23	We have two underutilized performing art centers that would solve all these problems if run correctly.
24	comedy club
25	comedy
26	children friendly family activities
27	Pets
28	none
29	More places for middle class adults. Oneonta has a few things for wealthy old people and a bunch of crap for kids, why not add something middle class people? Also bring places that serve decent food and why the hell did we get that horrible mall instead of a nice outdoor mall like Ithaca?
30	Been to B-Side several times, love COMPASS jazz quartet!
31	Make better use of Foothills PAC and put in a parking lot there

Downtown Customer Survey – Tabulation and Analysis

32	Museums
33	Revivals/Ministry
34	More jazz and other music not geared for college kids
35	community center
36	Amateur Wrestling
37	All of the above are available now.
38	Kids arts events and classes
39	I would really love a movie theater that had more independent films. We went to Albany in the last week to see Spotlight and Trumbo. The theater in the mall has to look at maximum return so it is all geared to the college crowd and kids. There are enough of us adults out there who would like more options
40	Rockwall/ropes course, fun physical activity center
41	A portable ice skating rink for downtown.
42	moving on to next question
43	Arts and entertainment, really. The FPAC is a joke, they do not utilize this asset, hoe about showing a movie once a week or once a month. That's ok, I will continue to go to the TOWN of ONEONTA and watch my movies at the SOUTH SIDE CINEMA.
44	Family Entertainment
45	Comedy club
46	informative programs
47	Local Car Shows
48	Upgrade your strip club!!
49	live music in a non-night club setting
50	Anything! Sidewalk sales.
51	Book fairs like the YA fest in Rochester
52	Children's activities (such as kids zone or children's museum or puppet shows)
53	I feel that Downtown is diverse enough already.
54	Closing main street to traffic. Turn main street into a pedestrian and bicycle only walkway.

Downtown Customer Survey – Tabulation and Analysis

55	Buffet
56	None
57	Concerts
58	Independent movies!
59	More live bands and indie rock dive bars needed. Tired of all this dance crap.
60	Y
61	Less bars, honestly too many drunken college students and they start early... I've brought my family out to dinner on several occasions to the downtown area and each time our dinner was ruined by drunken college students... we've even had the pleasure of walking into a restroom with vomit all over the floor, sink and toilet...
62	I wouldn't come downtown to see Jesus walk on water.
63	Not sure
64	Science center with hands on for kids. Big boom for our area!
65	comedy performances
66	Independent films, art lectures, contemporary theatre, outside the box arts and culture
67	More things like the grand and glorious
68	????L
69	we already have art and dance classes available downtown
70	Innovation, new technologies, demonstrations.....
71	Festivals that are family friendly and don't cost too much to attend. Some recent ones have been disappointing because they advertise family fun, but then you have to pay a lot of money for kids to enjoy the activities.
72	Adult couple dance class, cooking or adult art classes
73	Revive the Oneonta theatre- have movies a few nights a week, some stage shows, dance shows. Have someplace where people can go and dance
74	Yoga/tai chi
75	Affordable Kid friendly activities
76	?
77	Cooking classes

Downtown Customer Survey – Tabulation and Analysis

78	Movies came to south side After the movies going for pizza, or something, would be much easier.
79	Children's activities and family events Free and cheap entertainment
80	How about cultural themed festivals?!
81	The city getting a large store.
82	street bands and singers
83	rock concerts, kids activities
84	Depends on what this district is to become.
85	Family fun
86	Children's museum
87	Classic Rock Events
88	Alcohol Free Festivals and Events
89	I would not go for entertainment
90	Anything geared to kids
91	parades
92	nothing
93	gay bar

Open Ended Responses to Question #17a

Downtown Customer Survey – Tabulation and Analysis

Question #17a: If You Are a College Student, Which College Do You Attend?

Text Analysis – Showing 8 Words or Phrases:

Oneonta Alumni Oswego College Cobleskill SUNY Albany University Not a Student

	Other Responses:
1	Philadelphia University
2	SUNY IT
3	SUNY Oneonta alumni
4	SUNY Purchase College
5	NONE
6	I attend RIT in the fall/spring, and SUNY Oneonta in the summer, but I am from Oneonta
7	Tompkins Cortland Community College
8	SUNY Cobleskill
9	Oswego State
10	Cobleskill
11	Ithaca
12	SUNY Oswego
13	SUNY Broome

Downtown Customer Survey – Tabulation and Analysis

14	Hudson Valley Community College
15	Sage College of Albany
16	SUNY Delhi
17	SUNY Delhi
18	SUNY Broome
19	university at Buffalo
20	Utica College I grew up in Oneonta
21	NONE OF YOUR BUSINESS
22	no
23	Savannah College of Art and Design
24	P
25	Cornell university
26	SUNY ESF
27	SUNY Delhi
28	Not a student
29	SUNY New Paltz
30	none
31	Onondaga Community College
32	University of Central Florida
33	SUNY Delhi?
34	CW Post
35	No
36	None
37	Not a student

38	SUNY Polytechnic
39	Cortland State
40	SUNY Cortland
41	SUNY Albany
42	Fulton Montgomery
43	None
44	Cazenovia
45	Phoenix.edu
46	Did attend SUNY Oneonta
47	Graduated from Hartwick College
48	Alumni SUNY Oneonta
49	SUNY Cortland
50	American musical and dramatic academy
51	Out of state, Cooperstown is home
52	Morrisville (Norwich Campus)
53	SUNY Delhi
54	N/A
55	N/A
56	University of the people
57	SUNY BROOME
58	My husband is a SUNY Oneonta student. Career change.
59	Not
60	On board Hartwick College.
61	Oneonta alumni

Downtown Customer Survey – Tabulation and Analysis

62	Hartwick Alumni

Appendix C

Inventory of Hotel and Motel Properties in Otsego County

Table C-1
Inventory of Hotel and Motel Properties in Otsego County

Hotel/Motel Name	Address	Number of Rooms
Courtyard Oneonta	116 Courtyard Drive, Oneonta, NY 13820	95
Clarion Hotel	55 Market Street, Oneonta, NY 13820-2546	78
Super 8 Oneonta	4973 State Highway 23, Oneonta, NY 13820	60
Holiday Inn Oneonta	5206 State Highway 23, Oneonta, NY 13820	120
Hampton Inn Oneonta	225 River Street, Oneonta, NY 13820	107
Motel 88	340 Chestnut Street, Oneonta, NY 13820	66
Town House Motor Inn	318 Main St, Oneonta, NY 13820	37
Budget Inn	5059 State Highway 23, Oneonta, NY	16
Christopher's Country Lodge	716 State Highway 28, Oneonta, NY 13820	28
Dutch Maple Terrace Motel	3937 State Highway 7, Oneonta, NY 13820	10
Rainbow Inn	5690 State Highway 7, Oneonta, NY 13820	18
Red Carpet Inn on the Lake	2306 State Highway 28, Oneonta, NY 13820	25
Redwood Inn & Suites	6235 State Highway 7, Colliersville, NY 13820	10
Amber Life Inn	6175 State Highway 7, Colliersville, NY 13747	14
Sabatini's Villa	748 State Highway 28, Oneonta, NY 13820	20
	Total Rooms Oneonta Area	**704**
Bayside Inn & Marina	7090 State Highway 80, Cooperstown, NY 13326	41
Lakefront Motel, Restaurant & Marina	10 Fair Street, Cooperstown, NY 13326	43
Otesaga Resort Hotel	60 Lake Street, Cooperstown, NY	132
Holiday Inn Express Cooperstown	4758 State Highway 28, Cooperstown, NY 13326	74
Lake View Motel	6805 State Highway 80, Cooperstown, NY 13326	35
The Inn at Cooperstown	16 Chestnut Street, Cooperstown, NY 13326	18
Hickory Grove Motor Inn	6854 State Highway 80, Cooperstown, NY 13326	12
Lake 'N Pines Motel	7102 State Highway 80, Cooperstown, NY 13326	39
Aalsmeer Motel & Cottages	7078 State Hwy 80, Cooperstown, NY 13326	18
Baseball Town Motel	61 Main Street, Cooperstown, NY 13326	10
Country Inn & Suites	4470 State Highway 28, Milford, NY 13807	60
Country Motel	522 State Highway 7, Unadilla, NY 13849	15
Empire House Hotel & Restaurant	136 Marion Avenue, Gilbertsville, NY 13776	4
Fountain View Motel	3607 US Route 20, Richfield Springs, NY 13439	16
Heritage Inn	7412 St Hwy 28, Schuyler, NY 13457	12
K-C's Corner Motel	5705 State Highway 20, East Springfield, NY 13333	18
Lake House Restaurant & Lodge	2521 County Highway 22, Richfield Springs, NY 13439	55
Major League Motor Inn	6156 State Highway 28, Fly Creek, NY 13337	9
Mohican Motel	90 Chestnut Street, Cooperstown, NY 13326	13
Red Carpet Inn & Suites	4909 State Highway 28, Cooperstown, NY 13326	37
Terrace Motor Inn	6439 State Highway 80, Cooperstown, NY 13326	15
The Village Motel	168 East Main Street, Richfield Springs, NY 13439	11
	Total Rooms Other Otsego County	**687**
	Total Rooms Otsego County	**1391**

Source: Cooperstown/Otsego County website, Google maps, and ConsultEcon, Inc.

Appendix D

Breakdown of Estimate for Parking Garage Repair

Estimate Oneonta Parking

Estimated Cost:$614,681.06

Contingency: 15.00%

Estimated Total: $706,883.22

Base Date: 01/05/16

Spec Year: 08

Unit System: E

Work Type: GENERAL CONSTRUCTION

Highway Type: CONCRETE

Urban/Rural Type: Urban

Season: SUMMER (6/21 to 9/20)

County: OTSEGO

Latitude of Midpoint: 0

Longitude of Midpoint: 0

District: 09

Federal/State Project Number:

Prepared by System Administrator

Line #	Item Number / Description / *Supplemental Description*	Quantity	Units	Unit Price	Extension

Group 0001: Full Estimate

Line #	Item Number / Description / *Supplemental Description*	Quantity	Units	Unit Price	Extension
0005	520.50000004 SAWING CONCRETE	3,520.000	LF	$6.45367	$22,716.92
0006	580.01 REMOVAL OF STRUCTURAL CONCRETE	50.000	CY	$1,504.24501	$75,212.25
0007	555.09 CONCRETE FOR STRUCTURES, CLASS HP	50.000	CY	$1,823.50605	$91,175.30
0008	567.60 ARMORLESS BRIDGE JOINT SYSTEM	1,760.000	LF	$192.63769	$339,042.33
0009	574.020001 STRUCTURAL STEEL PAINTING: OVERCOATING	725.000	SF	$119.35760	$86,534.26

Total for Group 0001:$614,681.06