

Focus On the Future of Main Street

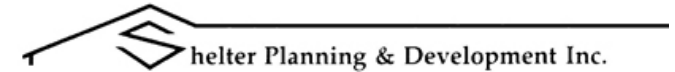
Presentation of
Findings and
Recommendations



City of Oneonta Common Council
June 7, 2016



In
association with





Introductions

James M. Martin, AICP – The LA Group

Senior Planner and Economic Development Specialist – **Project Manager**



- Responsible for overall project administration;
- Organized and executed public outreach and customer survey;
- Prepared interim deliverables and final document;
- Led the project team consisting of:
 - ❖ ConsultEcon
 - ❖ Trampoline Design
 - ❖ Foit-Albert Associates
 - ❖ Shelter Planning

James Stevens – ConSultEcon

Senior Associate – **Lead Economist**



- Principle author of the economic and market analysis;
- Participated directly in the focus group meetings;
- Formulated the questions for the customer survey ;
- Over ten years of experience with municipal and urban center market analysis and business planning



Project Overview and Study Methodology

What is the “Focus” ?

“Creation of a comprehensive strategy for the future of development in the City’s primary business district – downtown Oneonta”

How was the strategy developed?



Assessment and analysis of the three primary components of the economic development delivery system in Oneonta:

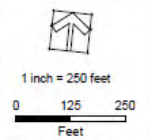
1. The physical aspects of the Main Street/Market Street
2. Programmatic aspects;
3. Administrative aspects



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**City of Oneonta - Focus on the Future of Main Street:
 Economic Development Planning Study
 Map #2: Study Area Map**



Legend
 Main Street Study Area
 Parcel Boundary

Project: 201587
 Date: 04/11/2016

Project Tasks

1. Analysis of existing conditions
2. Stakeholder and Community Engagement
3. Economic, Market and Housing Analysis
4. Summary of Emerging Trends Recommendations for Future Investments
5. Reviews of Infrastructure and Marketing Program
6. Recommendations for Future Investments
7. Recommendations for Actionable Items

GOAL: Improved Business Environment and Local Economy

A street scene with a white car, a truck, and buildings. The text "Community Engagement" is overlaid in the center. The scene shows a city street with a white sedan in the foreground, a truck behind it, and various buildings and trees in the background. A traffic light and a street sign are visible on the right side of the street. The overall tone is purple and semi-transparent.

Community Engagement

Engagement Techniques Employed

1. Stakeholder Interviews

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 on Main Street Economic
Development Planning

Interview With: Meg Hungerford, Int
Oneonta
Interviewed By: James Stevens, Cons
Date and Time: October 6

First Topic: Economics

The economy is stable, wanting to expa

Assets/advantages
Peter Clark is doing good work to bring
Assume interest & drive there to make
Downtown has a lot of appeal to colleges
Convenient – need more education abo
Farmer’s market on Plaza

Downtown Audiences
College students
people who live and work in downtown

Draws
restaurants draw from outside.
Oneonta draws from wide area, but not
perceived barrier about ease of getting
not sure if downtown has what people

Challenges
Letting people know downtown is here
messaging not consistent
not making it easy
streetscape-

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ConsultEcon, Inc.

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

4

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

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

Interview With: Jeff House
By: Jim Martin
Date and Time: Monday, October 5, 2015 @ 11:00am

First Topic:

g when improvement occurs
ng in tough
insulated due to 2 hospitals and colleges
children’s bookstore but ...
ad five (5) sporting goods stores-all gone

Having Micro Enterprise Grant

er floors residential
nize summer season
nsportation
five supporting business 50s or 100 busin
Business Development Center
Binghamton

Items changing
ntertainment/dining
estimation retailers (Walmart, Dick’s)
eakening of retail markets
living off some level of patronage market

py
until 215-221 Main now vacant (corner)
residential

es/Elements-Confusing signage with DOT

d retail
with Colleges
lumpy Based
Entrepreneur Training

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

Interview With: Mayor Gary Herzog
Interviewed By: Jim Martin and James Stevens
Date and Time: Monday, October 5, 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-Bresser’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/out-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.

2. Focus Group Meetings



Three meetings were held last fall:

1. Downtown property owners;
2. Downtown business owners; and
3. Downtown residents

3. Consumer Survey

City of Oneonta
FOCUS ON THE FUTURE OF MAIN STREET
 Downtown Customer Survey – Tabulation and Analysis

Prepared by:

The LA GROUP
 Landmark Architecture & Engineering P.C.

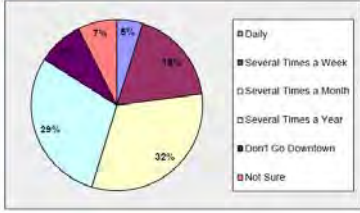
In Association with: **ConsultEcon, Inc.**

March 2016

City of Oneonta
FOCUS ON THE FUTURE OF MAIN STREET
 Downtown Customer Survey – Tabulation and Analysis

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	16.0%	240
Several Times a Month	31.5%	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.

What are the reasons you visit downtown?

Travel Food Main Street Reason Downtown Friendly
 Businesses Everyday Shop Parlors Parking
 College Kids Stores Raised Live Not Convenient Town
 Shopper Oneonta Family Trip Bars Walking

What new stores would bring you to downtown?

Drug Paper Music Deli Art Chains Target Ice Cream Bar Grocery
Clothing Electronics Restaurants Diner Shops Shoe
Gift Hobby Lobby Craft Love of Pete Kids Child Bakery Fabric
Students Pharmacy Movies Variety

A street scene with a white car, a truck, and buildings. The text "Market and Economic Analysis" is overlaid in the center. The image shows a city street with a white sedan in the foreground, a truck further down, and various storefronts and trees. A traffic light is visible on the right side of the street. The overall scene is in a muted, purple-tinted color scheme.

Market and Economic Analysis

Existing Conditions

Downtown is the center of commerce and community life in the regional economy

Downtown contains 1,800 jobs and is a net importer of jobs

There were 184 businesses inventoried

Top 5 sectors account for 80 percent of businesses downtown

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



Existing Conditions

Key Consumer-Oriented Business Clusters

- Restaurants (34)
- Miscellaneous Store Retailers (18)
- Personal and Laundry Services (18)
- Arts, Entertainment and Recreation (13)
- Sporting Goods, Hobby, Book and Music Stores (11)

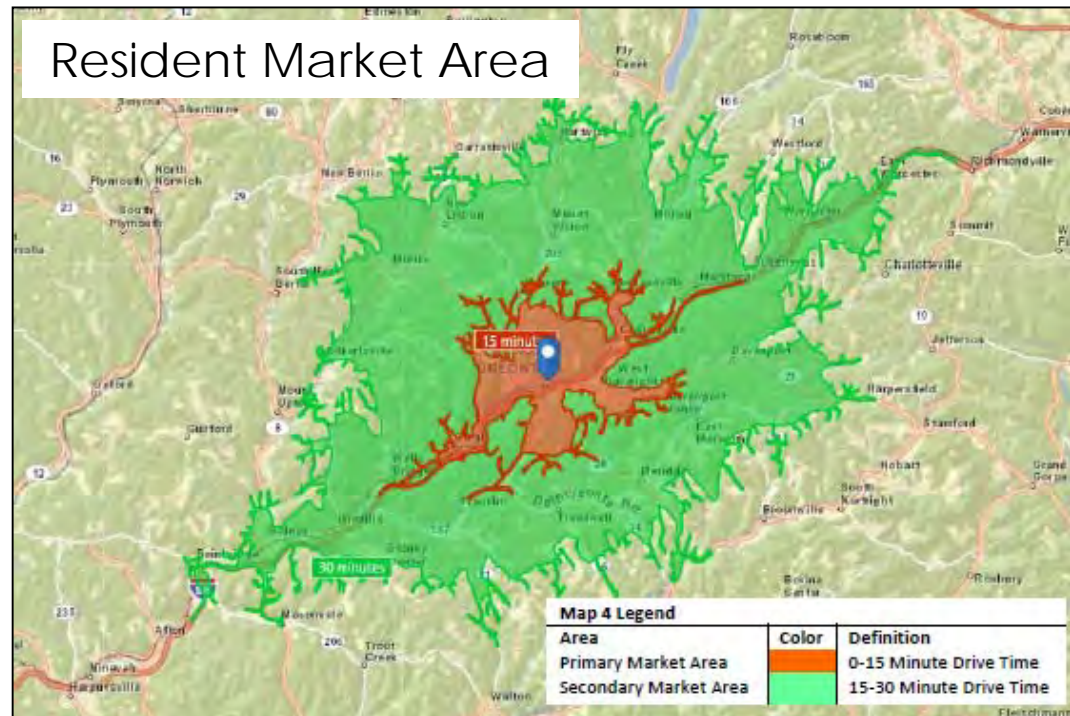
95% storefront occupancy rate indicates a healthy retail market



Market Analysis

Resident Market

- Population is projected to be stable and age
- Primary Market Area contains a large share of students
- \$1.29 billion in consumer spending capacity in 2015, projected to increase 13% to \$1.45 billion in 2020



Market Analysis

Sales Gap

The sales gap leakage in the Resident Market Area 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

Market Analysis

Tourist Market

1. Travelers spent more than \$175.6 million in Otsego County in 2014
2. Over half (704) of the hotel rooms in Otsego County are within 5 minutes of downtown – 2 hotels downtown
3. Between 2009 and 2014, the number of seasonal homes in Otsego County increased from 3,000 to 4,100 units
4. Cooperstown arts and cultural attractions and baseball field complex are important drivers of demand for seasonal housing
5. Downtown is an important visitor destination for goods and services supporting tourism activity countywide
6. Also contains concentration of live arts facilities, including the Oneonta Theater, the Foothills Performing Arts Center, and the B-Side Ballroom

Housing Analysis



Housing Profile

Housing Needs Assessment (HNA)

1. Develop a demographic profile
 - Population level – currently stagnant, forecast is for slight contraction
 - Age levels and household income skewed by “college student effect”
 - Demography points to the need for more market rate housing in the downtown area – growing segment of elderly population, diversity of services found in the downtown area
2. Inventory of community housing organizations – robust level of housing organizations with a full range of services
3. Description of Housing Types, Condition, and Status
 - City-wide – SF detached; downtown is more diverse
 - Most are in fair to good condition

Housing Issues & Gaps

1. Demand exists in the market for additional market rate housing in the downtown area
2. Progress is being made on lowering the number of vacant properties in the City – the actions undertaken require continued diligence
3. Take advantage of “low hanging fruit” with smart, common sense initiatives to address the full range of housing needs
4. Housing services - robust level of housing organizations with a full range of services – this is asset that ensures needs will continue to be addressed



Housing Recommendations & Strategies

- Assess the James F. Lettis apartments - rehabilitate or rebuild
- Redevelop the Westcott Parking lot (222 Main St.) for mixed use/market rate housing
- Remain vigilant regarding the issue of vacant properties
- Encourage rehabilitation through simplification of codes and opportunistic participation in available funding programs
- Consider establishment of housing trust
- Strategies are listed and detailed on pp.62-64

A street scene with a white car, a truck, and buildings. The text "Review of Marketing Program" is overlaid in the center. The image is a photograph of a city street, likely in a downtown area. On the left, there are buildings with signs for "Paw's Entertainment Food, Activities" and "OCULO & GALLERY". A white car is driving on the street, and a truck is parked on the side. On the right, there are more buildings, including one with a sign for "FOOD PLAZA". A traffic light is visible on the right side of the street. The overall scene is a typical urban street with various businesses and vehicles.

Review of Marketing Program

Research and Future Options



1



2

3



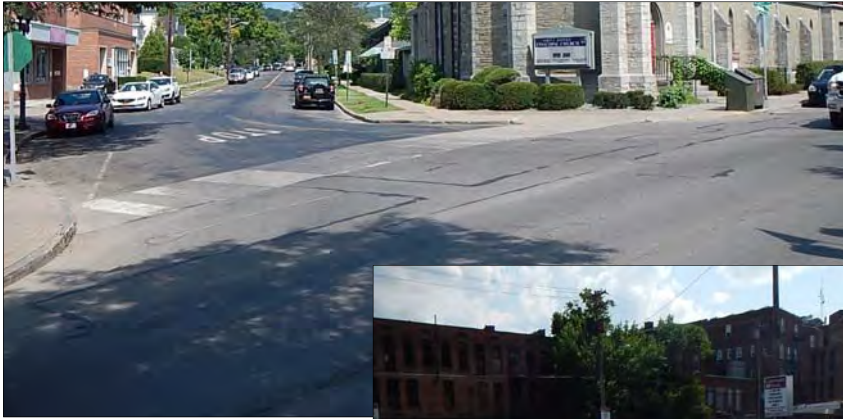
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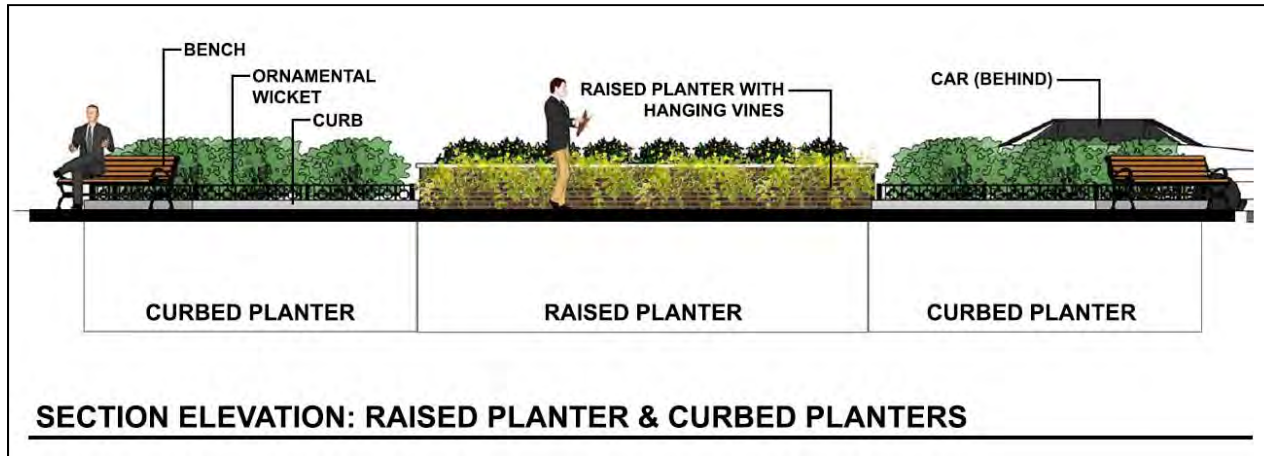
Infrastructure Analysis



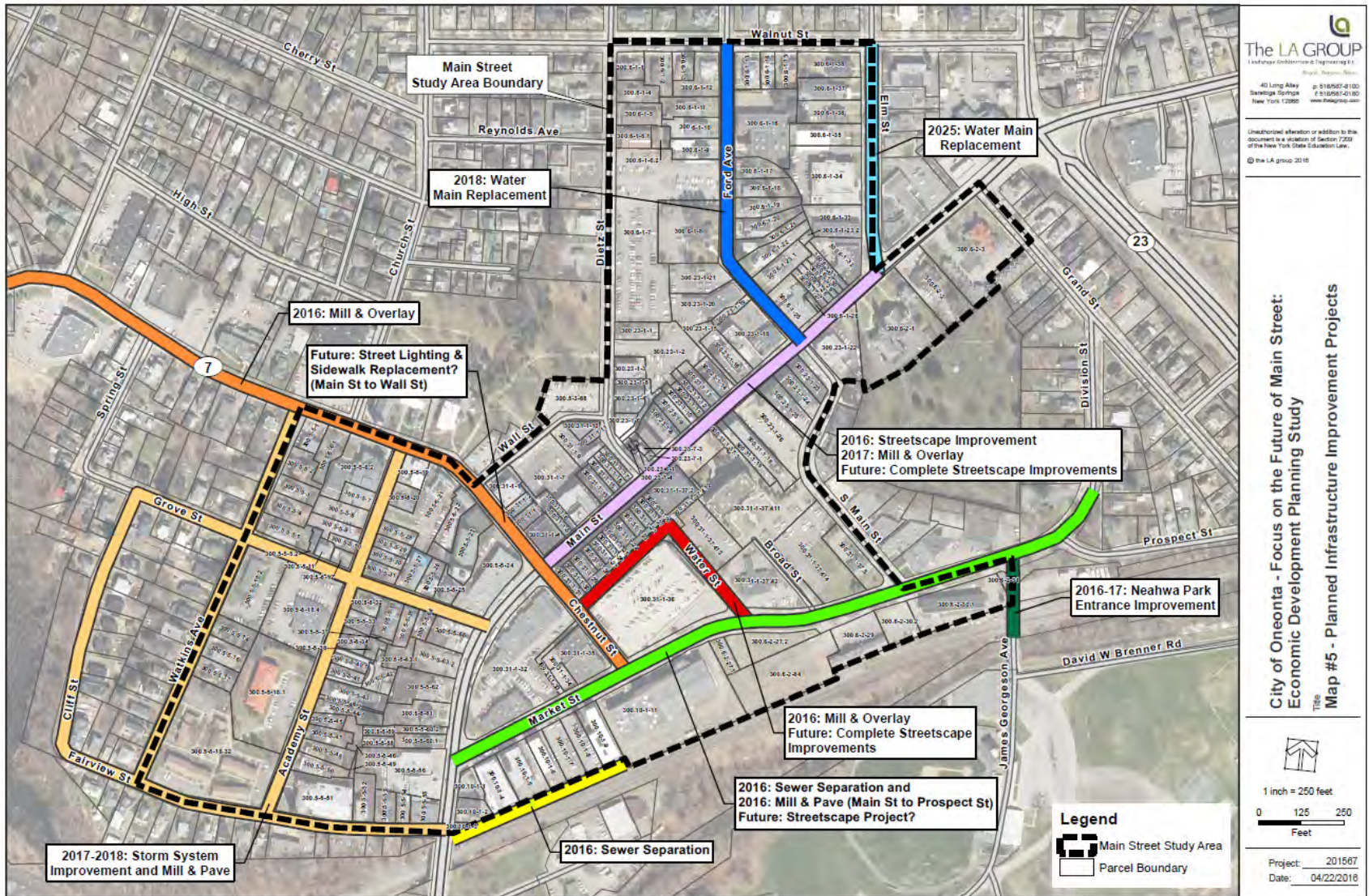
Existing Conditions



Proposed Conditions – Streetscape



Planned Improvements & Projects



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 Economic Development Planning Study
 The
 Map #5 - Planned Infrastructure Improvement Projects



1 inch = 250 feet
 0 125 250 Feet

Project: 201567
 Date: 04/22/2016

Emerging Trends



Niche Markets/Targeted Uses & Businesses

- Restaurants supportive of food hub, local food movement, and culinary tourism.
- Clothing and accessories, emerging cluster should double the number of stores in category in downtown to become more of an anchor cluster like restaurants.
- Arts and entertainment provide good offerings now, but are challenged with underutilized public assembly space.
- While not located downtown, Oneonta is a key part of Sports Tourism infrastructure serving the segment of baseball summer visitors.

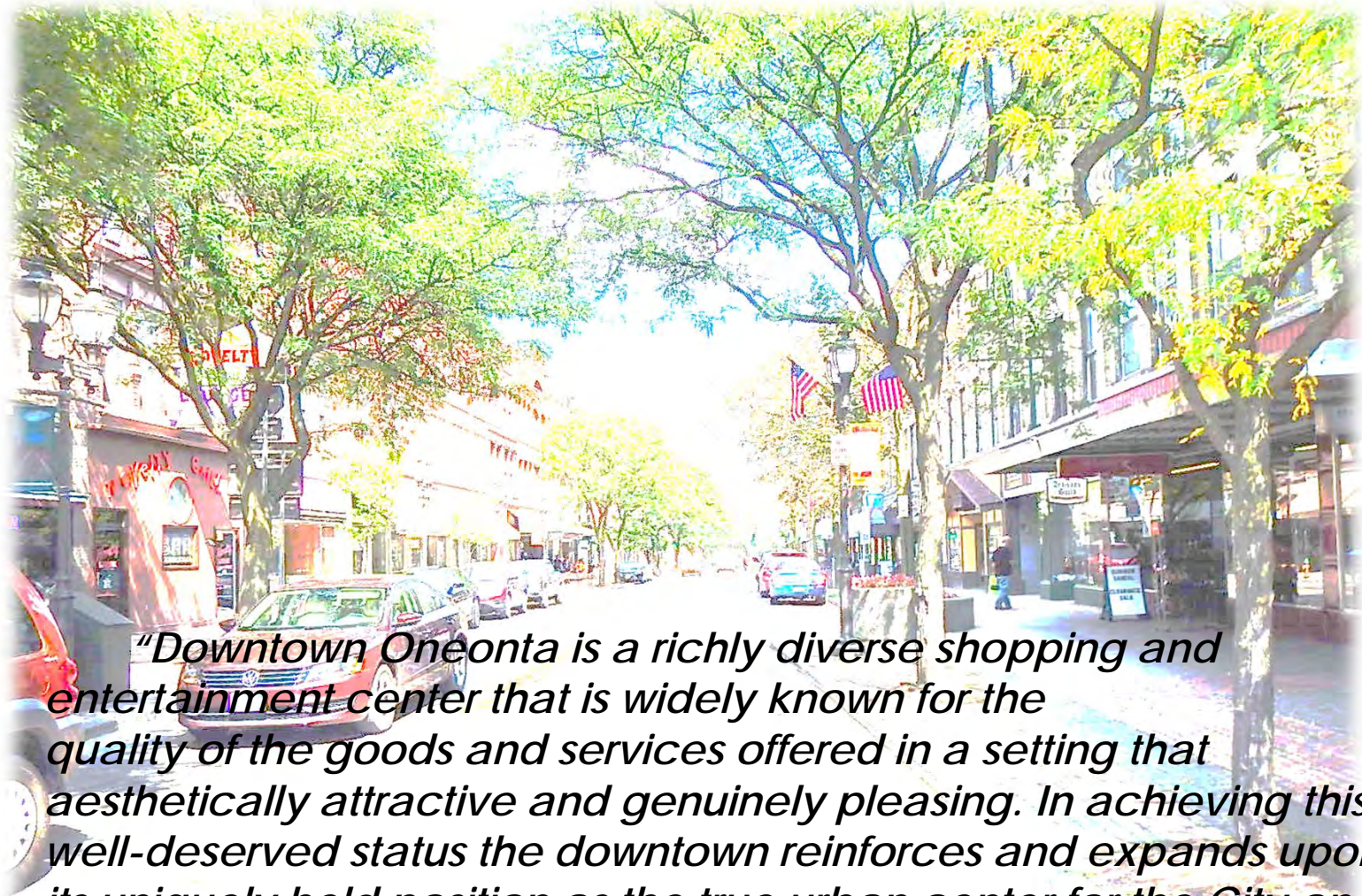
Other Noteworthy Trends

- 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.
- Rapid growth of e-commerce as a portion of retail sales are strength, weakness, opportunity, and threat (SWOT) all rolled up into one.
- Downtown's competitive advantage lays in the activities it offers.
- Downtown e-commerce and downtown web marketing.
- Education economy and college life downtown.
- "De-Mallification"



Vision Statement and Goals

Vision



“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 is 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.”

Goals

Comprehensive – Encompassing all elements of downtown Oneonta

Downtown Businesses

- Wide range of responsive goods and services
- Quality and knowledgeable customer service

Arts and Entertainment

- Takes advantage of heritage and location
- Wide ranging – performing and visual arts via private and public venues

Future Development

- Ever increasing goods, services, dining formats, and cuisines
- Accommodated in existing restored building stock

Delivery of Economic Development

- A new entity is formed with a sole focus on the economic health of downtown
- Assistance is provided to existing downtown businesses and new businesses are recruited

Gateways

- Aesthetic and functional improvements are made to primary entryways
- Elements of complete streets are provided along entry corridors

Housing

- New, permanent year-round housing exists on upper floors
- The living conditions at the James F. Lettis Apartments are improved

Infrastructure

- Wayfinding to existing lots/spaces is improved
- The City's program of regular maintenance continues to be effective

Marketing

- The marketing strategy is updated
- The theme of the program is reflected in all platforms and formats

A street scene with a white car, a truck, and buildings. The text "Strategy and Recommendations" is overlaid in the center. The scene shows a city street with a white sedan in the foreground, a truck parked on the side, and various storefronts and trees. A traffic light and a street lamp are visible on the right side of the road. The overall image has a purple tint.

Strategy and Recommendations

Priority and High-Priority Initiatives

High Priority Initiatives

Downtown Appearance

- Extend the streetscape program and its elements to other streets in downtown
- Improved facades and window displays
- Regular (annual) participation in the NYSMS Program is highly recommended

Economic Development Delivery System

- HIGHEST PRIORITY – More information to follow

Priority and High-Priority Initiatives

Moderate Priority Initiatives

- Redevelop the **Westcott Parking Lot (222 Main St.)** with a mixed-use building
- Build upon the elements of the **“Arts and Entertainment District”**
- **Redevelop 27-33 Market St.** with complementary uses to the arts and entertainment (e.g. more lodging spaces)
- **Improve the gateway corridors** (exits 15 and 14)
- **Improve internal accessibility and directional awareness**
- **Improve functionality and attractiveness of public spaces**
- Continue to **incentivize new, permanent residential units among upper level floors** of downtown buildings
- Conduct a feasibility study to either **rehabilitate or rebuild the James F. Lettis Apartments**
- Pursue the next phase of **development for the “Upper Susquehanna Agricultural Center”**
- Continue to work with Otsego NOW for the **successful redevelopment of the former rail yard** – new employment centers at this location will fuel downtown redevelopment



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**City of Oneonta - Focus on the Future of Main Street:
Economic Development Planning Study**
Title
Map #5: Downtown Strategies Map

Project: 201567
Date: 04/11/2016

A street scene with a white car, a delivery truck, and buildings. The image is overlaid with a semi-transparent purple filter. The text "The Economic Development Delivery System" is centered over the image.

The Economic Development Delivery System

Existing Conditions and Contributors



The City of Oneonta

- Infrastructure – sewer, water , roads, parking, drainage
- Land use regulation and project review
- Fire protection and police services
- Project support through grant program sponsorship
- Establishment of vision, strategy development and coordination
- Real property tax levy



The Otsego County IDA

- Project coordination
- Facilitation of project financing
- Incentivize project development
- Project support through grant program sponsorship
- Job creation – manufacturing, or large scale professional or service industry as primary focus

Existing Conditions and Contributors



Destination Oneonta

- Primary focus – attraction of visitors to downtown
- Informational source – downtown events, attractions and promotional materials
- Direct sponsorship of events - e.g. “Fabulous Fridays”; “Oneonta First Night”; “Tree Lighting”
- Maintenance of a webpage as the vehicle to convey information



The Otsego County Chamber of Commerce

- Provide member business advocacy
- Member networking events
- Sponsor for “Leadership Otsego” and the “Tri-County Young Professionals”
- County-wide focus – more regional in nature

Gaps and Recommendations

Gaps in the Economic Development Delivery System

- No direct and consistent focus on small business retention recruitment for the downtown area
- The City government is challenged with fewer options for increasing revenue while upward pressure on costs remains constant
- Lack of strategic means for developing vacant or underutilized parcels and buildings in the downtown area
- Lack of centralized coordination of existing efforts
- Need for a City-based entrepreneurial development program

Recommendation

- Working in partnership with Otsego NOW form a new local development corporation (LDC)
- Corporate charter of the LDC would be development of new downtown projects, business recruitment, entrepreneurial development and business retention
- Board of directors comprised of downtown property owners and business persons
- A potential revenue stream for the new LDC could be provided through a PILOT increment financing program (PIF) – other possibilities include assignment of loan proceeds to assist with funding

Questions?

