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Introduction and Background

Over the past several years there had been visible progress and improvements in Geneva's downtown such as street and sidewalk improvements, lighting and restoration of buildings. However, during the past several decades, the retail district in Geneva, New York has experienced economic transition. Once the community's primary source of retail goods and services, today Geneva's retail district faces intense competition from regional malls and local strip shopping areas, a downturn in the economy, and new expectations from the consumer. And, people within the Geneva area have lost touch with what the downtown retail district has, and the experience that it offers.

In 2008 Geneva's Business Improvement District Board of Directors recognized there were several symptoms of a declining downtown retail district and a strategic action plan was needed to address them.

1. Downtown businesses were facing several competitive barriers, including lack of information about customer groups, growing competition from area malls and shopping plazas, overall decline in the consumerism — local spending & tourism, growth in area shopping plazas and changes in corporate culture
2. There were an increasing number of storefront vacancies on Castle, Exchange and Seneca Streets, and there was concern about the types of businesses best suited to fill those vacancies.
3. There was increasing difficulty in recruiting new businesses to the downtown retail district.
4. The needs and expectations of the local residents, tourists, and employees of various companies who are within walking distance had changed. It was becoming even more important for the businesses to have up-to-date information about their customers and be positioned to respond to change.
5. There were organizational gaps

Recognizing the grave nature of the situation and the importance of developing a strategic plan designed to halt the erosion and bring customers back downtown, the GBID authorized the engagement of a consultant and charged the Tenant Recruitment Committee with overseeing the project. Susan M. Payne, Community & Economic Development Consultant was engaged. Mr. Dave Bunnell, Chair of the GBID's Growth and Development Committee, assumed the leadership role and gained the support of the other key stakeholder groups to pursue the major task of developing an economic development strategy built on the retail district's strengths, revitalizing it to survive the current economic conditions, and repositioning it for the future. The Tenant Recruitment Committee was assembled to work with the consultant to pursue a vision for a stable and economically viable downtown retail district. They worked together diligently over a 6-month period to undertake a task that resulted in a comprehensive set of strategies including retail mix and business development, tenant recruitment, physical infrastructure, festivals and events, communications, and an organizational structure for implementation.

Other stakeholder groups were anxious to work together to solve problems, and to develop a plan that would benefit the businesses, as well as, the property owners and the agencies that provided support. These stakeholder groups committed resources to support the project. It was agreed that a vision was needed for Geneva's retail district and it was important for all groups to cooperate and share information. There was consensus on the idea that the success of everyone would depend on their ability to have good information about customer groups and identify opportunities to attract customers, have a physical environment that customers found friendly and easy to use, and have a plan of action.

There were several needs and expectations to be fulfilled:

1. The merchants, lodging facilities, retail anchors and support groups need to look at everything that influences each customer group, facilitates their movement within the retail district, and motivates them to buy/attend/participate. This would involve looking at the existing mix of businesses, products in the retail district, advertising, promotions, events, and physical aspects such as building facades, parking, signage and more.
2. Existing and prospective businesses need current and accurate information on tourist and consumer trends, and customer-based market research information that would help them effectively plan for their future by understanding the needs and expectations of their customers.
3. An action plan is needed that will focus on increasing profitability of individual businesses by providing strategies to position the retail district for the future in terms of retail mix, physical improvements, and special events.
4. Coordination and communication among all entities in the retail district was going to be essential: businesses, tourism destinations, property owners/landlords, private developers, financial institutions, City of Geneva, and the various groups that provide support.
5. There needs to be a shift in decision-making from subjective opinion to consumer driven strategies. This would call for the development of an unbiased strategy based on an integrated approach: business, product and marketing issues.
6. The strategy development needs to be fully integrated: management, resource allocation, physical infrastructure, marketing and communication
7. There needs to be a single plan that could be embraced by all. It would need to focus on a common vision and goals, and be action-oriented for immediate implementation.
8. The action plan needs to be sensitive to important factors such as the pressure of fewer resources, emphasis on ROI and accountability, support and involvement of the City government leadership, willingness to share information, new entrepreneurial spirit among merchants, and receptivity to change and working collaboratively

This was a large agenda and early in the process it was determined that the keys to the project's success would be involvement at all levels, confidence in the consultant, constant and open communication, strong leadership, quality research and analysis, learning from other communities, focusing on a single vision, sharing of ideas and creative energy, willingness to openly discuss difficult issues, and clearly defining roles and responsibilities for implementation of the strategic plan. This combination of ingredients would prove to be essential in developing a revitalization program that would include recruiting new businesses, helping existing businesses expand or add new product lines, improving the

effectiveness of advertising, launching successful promotional events and designing incentive programs for building improvements and reinvestment in existing businesses.

Despite the fact that the International Council of Shopping Centers reported that the 2008 holiday shopping season was the worst in 38 years, it was a good time to do planning and get to the heart of the downtown Geneva issues. It's was good time to revive the community spirit and build strong and meaningful relationships between those groups and individuals that have the capacity to bring about change.

The study project was officially launched in January 2009 with the first meeting of the project sponsors and the GBID Tenant Recruitment Committee. The study process was completed in June 2009 and resulted in a detailed set of strategies and tactics in the areas of community pride, organizational structure, retail mix, business recruitment and retention, business promotion, property development, physical infrastructure, branding, and marketing and communications.

Acknowledgements

The project would not have reached its comprehensive level without the participation by the stakeholders and many volunteers throughout the community.

Many thanks to the following groups for their financial and/or "in kind" support of the Business Improvement District's initiative to develop a program for the commercial revitalization of downtown Geneva, through a targeted and pro-active tenant recruitment program.

Bank of the Finger Lakes
Belhurst Castle
CCN International
Century 21 Steve Davoli Real Estate
City of Geneva
Coldwell Banker Parrot-Venuti Real Estate
First Niagara Bank
Geneva Area Chamber of Commerce
Geneva Business Improvement District
Geneva General Hospital
Geneva Growth

Geneva Industrial Development
Authority
Geneva on the Lake
Geneva Club Beverage
Guardian Glass
Hampton Inn
Hobart William Smith Colleges
In-House Graphic Design
Lake-to-Lake Reality
Lyons National Bank
Ramada Inn Geneva Lakefront
Zotos International

And, a thank you to those who provided voluntary time on specific projects.

- Mr. Matthew Parrott, owner of Parrott Realty, who prepared the Parking Analysis
- Mr. Eric Ameigh, City of Geneva Planner who prepared the mapping
- Mr. Bob Stivers, GBID Board member and local property owner, who assisted with collecting data to evaluate first floor and upper story development and vacant rates
- Mr. Dave Bunnell, GBID Board member and Chair of the Growth and Development Committee, who dedicated countless hours to his role as project chair
- Ms. Sherri Geary, Interim Director of the Geneva Business Improvement District, who provided information on communications and festivals/events, and other important organizational information
- Mr. Rob Gladden, President of the Geneva Area Chamber of Commerce who provided data on tourism visitation rates
- Mr. Mike Fults, Ramada Inn Marketing Director, who provided the meeting space

The Tenant Recruitment Committee was charged by the GBID Board of Directors to guide the process.

Chair: Dave Bunnell, GBID Board

Committee Members:

Valerie Bassett, Director of Economic Development, City of Geneva

Phil Beckley, Chair, Geneva Growth

Nick Davoli, GBID Board

Joe Fragnoli, GBID Board

Mike Fults, President, GBID Board

Sherri Geary, Interim Executive Director, GBID

Rob Gladden, Executive Director, Geneva Area Chamber of Commerce

Rob Flowers, VP of Student Affairs, Hobart William Smith Colleges

Matt Horn, City Manager, City of Geneva

Wendy Marsh, Chair, Finger Lakes Regional Arts Council

Bob Stivers, GBID Board

Project Goal and Objectives

The following project goal and objectives were established.

PROJECT GOAL

To achieve Commercial Revitalization of Geneva's Downtown by leveraging the City's many assets to make its downtown dynamic and recognized as "the exciting and interesting place to be" for local, regional and seasonal residents, and the traveling shopper, that will result in the foot traffic and critical mass necessary to support continuous investment in business development, property development and physical infrastructure improvements.

PROJECT OBJECTIVES

Objective #1: Achieve Unity of Purpose with a shared vision and focus on a single agenda for Downtown Geneva's Commercial Revitalization

Issues to be addressed and expected outcomes:

- Assemble a strong leadership core that is committed to the future of Geneva's retail district
- Develop a strong organizational structure to support and promote this strategic plan
- Develop mechanism to make decisions based on facts, and not on speculation and emotions.
- More efficiently target resources to increase retail sales that will help build strong businesses and attract others to make the Geneva Business Improvement District financially viable for the long run
- Clearly define roles and relationships among all the different organizations

Objective #2: Increase Coordination, Communication and Participation among the Stakeholder Groups to Bring About Real Change

Issues to be addressed and expected outcomes:

- Identify and eliminate competition and duplication of effort among various organizations – save time and money with better results
- Increase trust and reduce frustration with shared agenda and improved lines of communication

Objective #3: Reduce Storefront Vacancies and Strengthen Retail Sales of Existing Businesses

Issues to be addressed and expected outcomes:

- Reduce the first floor storefront vacancy rate by undertaking a retail business development program to include business retention, expansion of existing businesses, and targeted recruitment program focused on consumer-based market research
- Develop and implement a retail business promotion strategy

- Achieve a higher return on advertising dollar (individual businesses and the GBID as a whole) with better information about what customers need and want
- Help position Geneva's retail district and individual businesses to respond to changes in the economy
- Possibly reduce the high cost of advertising and promotional activities for individual businesses in the long run

Objective #4: Gain Efficiencies and Leverage Limited Resources to Enhance the Physical Infrastructure and Image of the Downtown

Issues to be addressed and expected outcomes:

- Develop strategies such as upper story development and events/activities intended to achieve increased critical mass by increasing routine foot traffic
- Develop a strategies that will maintain the momentum for renovation of downtown properties
- Enhance the charm and character of the physical infrastructure such as streetscape, continued building restoration, development of a Cultural Walk, etc.
- Develop proactive investment strategy and ROI strategy for anchor buildings, rather than responding to individual needs, requests and crises.
- Routinely assess return on investment – property, organizations, events and activities.

Objective #5: Re-establish Geneva's Downtown as the Heartbeat of Community Activities

Issues to be addressed and expected outcomes:

- Create a unified downtown image
- Build community pride

Approach and Methodology

PROJECT COMPONENTS

1. Downtown Image, Culture and Heritage: Develop a plan that builds the community's pride in its culture and heritage, and improves the image of the downtown among the local residents and all consumer groups.
2. Property Development: Develop a plan to create and maintain the physical environment and vehicle/foot traffic flow necessary to generate and support retail sales.
3. Business Development and Promotion: Design and implement a plan to target a balanced retail mix, reduce vacancies, enhance the mixed uses in terms of location, merchandise, and brand recognition for the various target market groups.
4. Marketing/Promotion: Develop and implement a branding strategy and promotional activities designed to attract/capture tourists, local residents, employee and customer groups and motivate them to buy.
5. Implementation: Develop an implementation plan that integrates the management of critical issues, maintains focus and oversees implementation of strategic initiatives through leadership, coordination and accountability.

The consultant recommended developing a plan based on sound customer-based market research, and looking at everything that influences a potential customer's decision to visit Geneva's retail district and motivation to buy -- mix of businesses, retail trends, advertising, promotions, events, foot and traffic flow, building facades, parking, signage, and more.



The following research topics and sources of information established the framework for the overall approach and detailed market research and analysis. The consultant developed the overall research design, including sources and original survey forms, and performed the original research when appropriate. Note that the firm KS&R Market Research implemented the 200-person phone survey, and provided the raw data to the consultant. Ms. Victoria Ehlen, independent planning consultant, prepared the compilation of raw data and preliminary analysis of the consumer-based market research from the phone survey and focus groups, demographic profiles, retail gap and consumer buying power analysis, commute and travel patterns, and walkability study.

Topic	Scope	Sources of Information
Consumer Groups	<ul style="list-style-type: none"> • demographic profile • commute patterns • consumer trends and buying power • consumer motivating factors • consumer needs and expectations 	<ul style="list-style-type: none"> • US Census • 200 person phone survey conducted by KS&R • 5 focus groups (Geneva Hospital, Lyons Bank, Hobart & William Smith Colleges, Finger Lakes Times, merchants) • NRF 2007 Back-to-College Consumer Intentions and Actions Survey • National Retail Federation 2007 • Short Woman: Market, Business, and Economy • Finger Lakes Tourism Alliance 2007 Randall Report • Geneva Visitor Center Visitation Data • <i>Economic Impact of Tourism in NYS, Finger Lakes Focus</i>; Aug 2008; Tourism Economic • Claritas, January 2009 • International Council of Shopping Centers Report; January 2009
Downtown Image and Dynamics	<ul style="list-style-type: none"> • charm and character • consumer perceptions • image comparison to other communities 	<ul style="list-style-type: none"> • 200 person phone survey conducted by KS&R • 6 focus groups (Geneva Hospital, Lyons Bank, Hobart & William Smith Colleges (2), Finger Lakes Times, merchants)

Retail Business Development

- target consumer groups
- vacancy rates
- business turn-over
- business promotion
- retail mix
- retail gap analysis
- recruitment targets
- potential in key areas such as the arts
- healthcare and education
- Geneva Business Improvement District
- Geneva Growth
- City of Geneva Planning Department
- Claritas Retail Gap Analysis
- Interviews with property owners
- Merchant focus group
- Benchmark Community Interviews
- Amherst Center, MA
- Northampton, MA
- Brunswick, ME
- Saratoga Springs, NY
- Ithaca, NY
- Oberlin, OH
- Painseville, OH
- Traverse City, MI
- Sault St. Marie, MI
- Chippewa Falls, WI

Marketing and Communications

- downtown promotion
- communication tools
- events
- festivals
- Geneva Business Improvement District
- Benchmark Communities

Property Development

- building rehabilitation
- building usage
- upper story development
- plans for in-fill development
- City zoning and codes
- City design guidelines
- Geneva Business Improvement District
- City of Geneva Planning Department
- Geneva Lakefront and Downtown Master plan
- City of Geneva Neighborhood Study
- Feasibility Study and Business Plan for a Finger Lakes Visitor Center (Fairweather Consulting)

Physical Infrastructure

- ease of use
- ADA compliance
- Safety
- gathering places
- parking quantity and convenience
- Walkability Study
- Parking Analysis prepared by Matt Parrott
- City of Geneva Planning Department

Preservation & Design

- façade improvements
- City design guidelines
- signage
- City of Geneva Planning Department



Core Values and Assumptions

Evaluation of Geneva's downtown and recommendations for its commercial revitalization are based on a set of core values and assumptions. These are composed of a value-driven set of ideals that should be considered by all stakeholders groups as they undertake this plan. Adopting and abiding by these core values should lead to initiatives that bring economic development, and enhance the overall quality of the downtown.

DOWNTOWN IMAGE

- Downtown charm is about walking up and down tree-lined streets and stopping to browse, enjoying displays in shop windows, admiring the details of interesting and unique historic buildings, having opportunities to gather at restaurants as well as public places, and enjoying entertaining activities such as artwork.
- The downtown's image defines Geneva's identity
- The people of Geneva want a sense of belonging and pride
- When a downtown's image declines, consumer confidence declines, sales slide, sales tax revenue falls, businesses close, property values decline and buildings deteriorate.
- It is important to demonstrate success and highlight Geneva's assets to the local and regional residents, and be able to answer the following question with a positive response: "Why should I support Downtown Geneva?"

DOWNTOWN CULTURE AND HERITAGE

- Successful downtowns are those that offer a walk through a nostalgic place and shopping that is about finding both practical and unusual things in a comfortable and interesting environment.
- Landmarks of a former time are an integral a part of an interesting downtown, including the beautifully restored The Smith Opera House, the City Hall and the Post Office. The consumer needs to be led to these buildings and then provided with information about the history and character is these buildings.

CRITICAL MASS

- To support the high cost of rehabilitation and maintenance of the downtown's physical infrastructure, including historic buildings and in-fill development, it is important to maintain a critical mass including a mix of first floor and upper story tenants, and customers needed for long-term viability of the retail shops

BUSINESS DEVELOPMENT AND PROMOTION

- Shopping should be a fun and entertaining experience
- People value personal attention, name recognition and exemplary customer service
- There should be a strong mix of restaurants and stores of all varieties selling clothing, furniture, art, music, sporting goods, foods, books, bicycles, eye wear, jewelry, stationary, kitchen accessories, toys, kites, antiques and so on.

Property Development

- Upper story development fuels first floor retail
- Smaller, mixed-use developments offering upper story housing and street level retail, woven into the fabric of popular in-town neighborhoods, make downtowns stronger
- Clustering and incremental development has a greater impact than scattered development: community image, stimulating investment, and business retention and recruitment
- Streetscape is important and is considered the final layer of “decorating” the downtown ... benches, artwork, etc.

IMPLEMENTATION

- Unity of purpose and collaborative efforts among the public and private sectors are the driving forces that will make Geneva vibrant, including the arts, education, healthcare, merchants, property owners and the City of Geneva
- It is essential to have people on the GBID Board of Directors who have the passion, energy and resources to make things happen, and are all working toward achieving a shared vision for a dynamic downtown
- The focus must be on the major elements of downtown revitalization and development, including business development, property development, safety, physical infrastructure, entertainment, brand development, advertising and promotion
- The GBID must be financially self-sufficient and generate the income needed to support the programming efforts for business recruitment and retention, events and other forms of entertainment, and clean and safe environment.
- The GBID must continually assess the return on its investment in programs and activities

Analysis and Recommended Strategies

Community Pride and Sense of Ownership

RESEARCH UNDERTAKEN	1. <i>Consumer-based market research (KS&R consumer-based market research, focus groups, interviews)</i>
	2. <i>Benchmark communities</i>
	3. <i>City of Geneva Neighborhood Study (2009)</i>

IMAGE ISSUES

- Residents lack pride and ownership of downtown. The focus group participants struggled with naming a Downtown Geneva “wow” factor or a single phrase that they might use to boast about their downtown. They could not point to a center of the city, a place to meet a friend just because Downtown Geneva is “the place to be.”
- Positive images of Geneva are of The Smith Opera House, Hobart and William Smith Colleges, and the waterfront
- Negative image among regional residents include crime, lack of character and charm, old and vacant buildings, and a “lack of things to do”
- College students do not feel welcome or part of the community
- No gateways that are clearly defined and welcoming
- Downtown is not “human scale”
- Boring and nothing interesting to do. Want more waterfront and downtown activities that are interactive, entertaining, affordable and family-oriented.
- Current image: “Bars, Banks and Parking Lots”
- Echo conclusion in recent Housing Study ... “it is critically important that Geneva begin to rebuild the sense of community that made cities like Geneva so desirable years ago.”

Strategies to Enhance Sense of Community Pride and Ownership

- *Develop a Unified Image:* Develop a brand for downtown and involve the City of Geneva, merchants and property owners in adopting and promoting it. *Examples: Ithaca is GORGES, Ithaca: Where Innovation and Culture Converge*
- *Embrace the College Students and Create a Friendly “College Town Feeling”:* Make the college students from Hobart and William Smith Colleges and FL Community College feel that they are part of the community. Have a “welcome students” outdoor event with music, games, picnic, etc.
- *Build Community Participation:* Develop innovative ways to enhance community participation in activities that are inexpensive, family-oriented, fun and interactive. Examples: Easter egg hunt, dog parade, fun-run, etc.
- *Epicenter of the Arts in the Finger Lakes:* Strengthen the collaboration between the GBID, the City of Geneva, the colleges, The Smith Opera House, the schools and other partners to identify ways to make Geneva the “epicenter of the arts in the Finger Lakes”
- *Promote Geneva’s Culture and Heritage:* Work with the City, arts organizations, the schools and other partners to identify ways to embrace the community’s culture and heritage. Examples: photo exhibit of scenes from Geneva’s history; school curriculum for elementary students that involves walking tour of historic buildings; an outdoor event with historic characters in costume; downtown wine tasting sponsored by wineries; encourage social and cultural organizations to hold events in the downtown; routinely highlight the history of Geneva through a series of articles in the Finger Lakes times that how the history of Geneva ties into national accomplishments or trends today
- *Bring Merchants and School Children Together.* Example: merchant adopts an elementary school class and they decorate the store windows on occasions such as Halloween
- *State-wide Recognition:* Work with the other community partners to identify a project the City could undertake that would gain regional or state-wide attention (saving energy, losing weight, etc.)
- *Customer Friendly Environment.* Work with the merchants to provide “superior customer service”, a welcoming feeling (open retail store doors in nice weather, potted plants on sidewalk, post open flags), fun and interesting things to do
- *Safe Environment:* Heighten visibility of police in the downtown area, especially after dark

Retail Business Recruitment and Retention

RESEARCH UNDERTAKEN	
	1. <i>Demographic profile of target market groups</i>
	2. <i>Needs , expectations and motivations of consumers (US Census, Claritas Population Projections, KS&R phone survey, focus groups, Geneva Chamber of Commerce, Finger Lakes Tourism Alliance)</i>
	3. <i>The Economic Impact of Tourism in NYS – Finger Lakes Focus (8/08)</i>
	4. <i>Randall Tourism Study (2008)</i>
	5. <i>Consumer trends and market opportunities</i>
	6. <i>Commute and travel patterns</i>
	7. <i>1st floor vacancies</i>
	8. <i>Business turn-over rates and patterns</i>
	9. <i>Inventory of business categories in 0-8 miles radius</i>
	10. <i>Anchor building, upper story occupancy, and property development mapping and data analysis</i>
	11. <i>Lakefront Master Plan Study (Bergmann & Associates, 2009)</i>
	12. <i>Sales “gap” analysis and consumer buying power (Claritas)</i>
	13. <i>Benchmark communities</i>
	14. <i>Inventory of business and retail mix</i>
	15. <i>Parking analysis (2009)</i>

KEY INDICATORS

There are several key indicators that contribute to knowing and understanding the consumer groups, their needs and expectations, and assess the demand for retail.

- Demographic profile of target customer groups
- Motivations , lifestyle trends, travel and commute patterns, buying trends, and buying power of various consumer groups: current and projected
- Consumer behavior and shopping patterns: shopping frequency and hours, shopping motivators/deterrents factors (friendly shopping, everyday values, hours, merchandise, etc), and needs and expectations
- Flux in the housing market, and changes in where people live and their housing preferences
- Consumer needs and expectations
- Perceptions and overall attitude of local and regional residents toward downtown
- Image of Geneva’s downtown in comparison to other shopping destinations
- Retail mix and gaps

ECONOMIC BASE

As of 2009, Geneva's population is approximately 13,200 people. Since 2000, it has had a decline in population of 1.84%. The median home cost in Geneva is \$83,010. Home appreciation the last year has dropped 3.90%. Compared to the rest of the country, Geneva's cost of living is 20.80% lower than the U.S. average.

The leading industries in Geneva, New York are educational, health and social services, 34%; manufacturing, 11%; and arts, entertainment, recreation, accommodation and food services, 11%. Geneva job listings indicate that the following industries in Geneva are hiring the most workers: Misc Store Retailers, Accounting & Auditing Firms, Office Supply Stores, Computer & Software Stores and Catering Services. Among the most common occupations in Geneva are management, professional, and related occupations, 30%; sales and office occupations, 23%; and, service occupations, 20%. Approximately 72 % of workers in Geneva work for companies, 16 % work for the government and 4 % are self-employed.

The unemployment rate in Geneva is 8.60 % (U.S. avg. is 8.50%). Recent job growth is negative, and Geneva jobs have decreased by 0.80 %. Currently, the most commonly listed Geneva jobs are for bar / restaurant jobs, job services jobs, rep-retail sales jobs, manager trainee jobs, sales associate jobs and assistant manager jobs.

Despite the unemployment rate and loss of populations, there remain strong economic indicators. Geneva's downtown has received an infusion of public and private investment totaling more than \$7 million in building rehabilitation during the past few years. There are other key indicators of a stable economic base including established area employers, a downtown workforce, comparatively low unemployment rate, stable college enrollments, a solid and upscale seasonal resident base, a growing tourism industry, a cadre of arts patrons, and destinations and attractions such as:

- Seneca Lake waterfront, with beautiful park and potential for waterfront retail activities
- The Smith Opera House
- Hobart and William Smith Colleges
- Festivals and events
- The Smith Opera House
- A new theatre facility planned for the college campus
- Performing arts schedule
- Nationally recognized artists, speakers and personalities

BUSINESS DEVELOPMENT TOOLS

There are several business development tools already in existence that can be utilized for both retail and property development efforts. These include the GBID staff, IDA, Geneva Area Chamber of Commerce, Geneva Growth, Empire Zone, 485 (b), local bank investments through reduced-rate loan programs, low-interest loan program administered by the City of Geneva, the Small Business Development Center and The Enterprise Center, and a supportive media.

ANALYSIS OF DEMOGRAPHIC PROFILE OF YEAR-AROUND RESIDENTS

POPULATION

As of 2000, Geneva was a city with a population of 13,617. The population is expected to decline slightly by 2013. Positive factors are that the City has an average racial mix, access to nearby wealthy populations, and a high percentage of college students. Negative factors affecting the City Proper include poverty, a high percentage of renters, and low income figures.

Most significant is Hobart and William Smith Colleges that have left a strong demographic mark on the City. There are a substantial number of college students living in the City; that is, 1,815 or 13.3% percent of the population is living in Group Quarters (a measure of persons in dormitories, hospitals and other institutions). The average age of the population is somewhat lower than the national average due to the high concentration of young college students in a small city.

AGE AND GENDER MIX

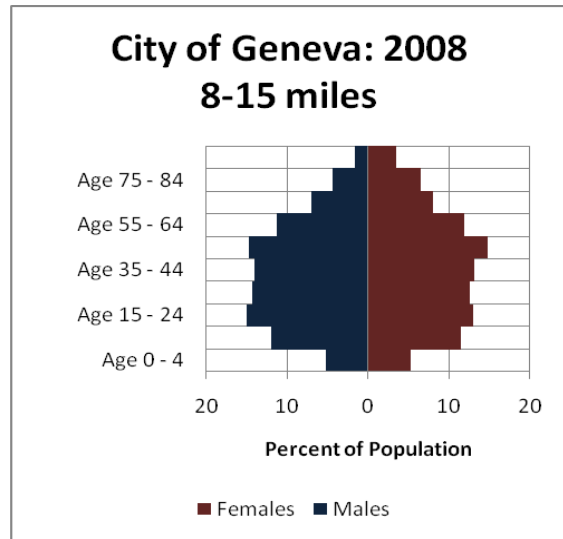
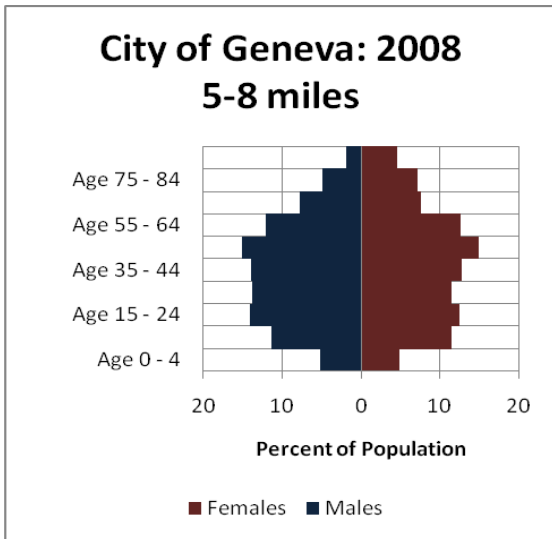
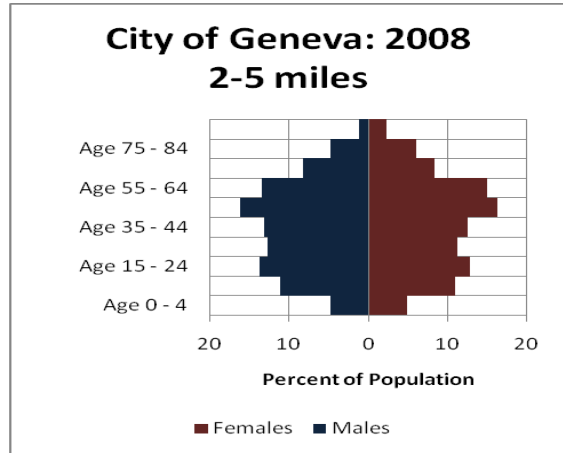
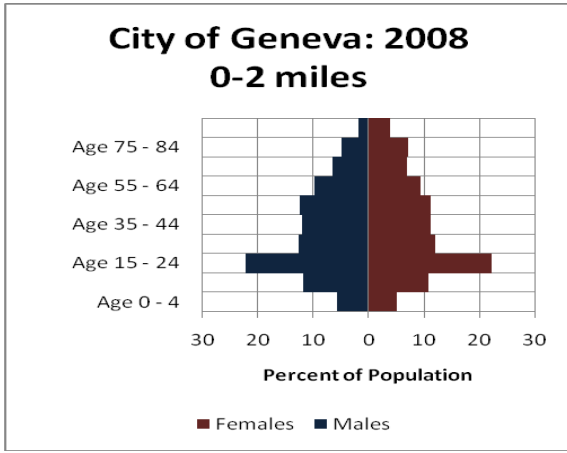
The youngest population group resides in the 0-2 mile radius, and is 78% Caucasian and 22% minority. It is also the lowest income area, with the highest concentration of renters versus home owners.

The 2-15 mile radius is where the highest income families reside, as well as the largest percentage of home owners. It is predominantly Caucasian (95%); however, it has the fastest aging population. The preliminary population estimates from Cornell University's Program on Applied Demographics project that between 2005 and 2020, the region's working age population (ages 16-64) will decrease by 12%, and the region's 65 and older population will increase by nearly 20% ... greatly increasing the demand for health care and related support services as described in the exhibits below.

Following are population pyramids that illustration the trends of the population in the study area. Three main conclusions can be drawn.

- 1) The suburbs surrounding Geneva show a very normal population trend, with no signs of acute population change in the near future.
- 2) The colleges in Geneva attract a significant number of young people to live in the City. Some of the college students remain in the City of Geneva for a few years after graduation or there are a significant number of 24 year old college students.
- 3) Geneva's population is dominated by the elderly. If the elderly portion of the population is still living at home, there will be a significant population drop in the next 20 years (and a corresponding change in the housing market). If the elderly population lives primarily in intuitional settings, the population is not expected to fall in such a precipitous way (as facilities empty due to population loss, the elderly from the surrounding region may move into the available spaces).

Exhibit 1. Population Trends by Age

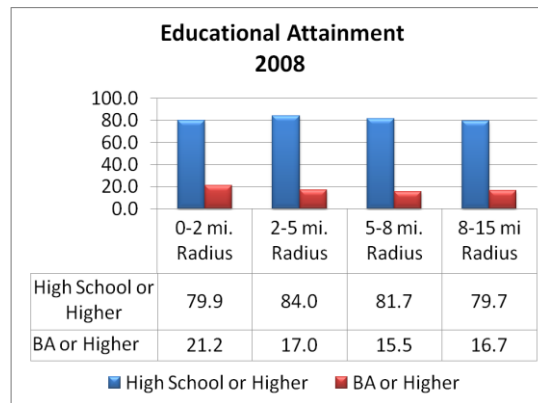


EDUCATION

Geneva’s Educational attainment is slightly below the national average (Bachelors or higher 21.8% vs. 27.0%). The Percentage of high school graduates is also slightly different (78.5% vs. 84%).

The highest level is in the 0-2 mile radius, reflecting the Hobart and William Smith Colleges (21% of the population has a BA or higher). However, the average percent of high school or higher is fairly consistent throughout the service area at about 80%.

Exhibit 2. Educational Attainment



INCOME AND POVERTY RATE

According to the 2000 Census and the 2008 Claritas Demographic Data, the percentage of both individuals and families in poverty is high. The poverty figures are high compared to the national poverty averages; the percent of families/ individuals in poverty is high even compared to the Geneva Suburbs. The following graphs show a striking trend occurring between the City Proper and the surrounding suburban areas. The City of Geneva is a home to a substantial number of people in poverty, the Urban Poor. The residents of the immediate suburbs are better off financially, only 5.19% are in

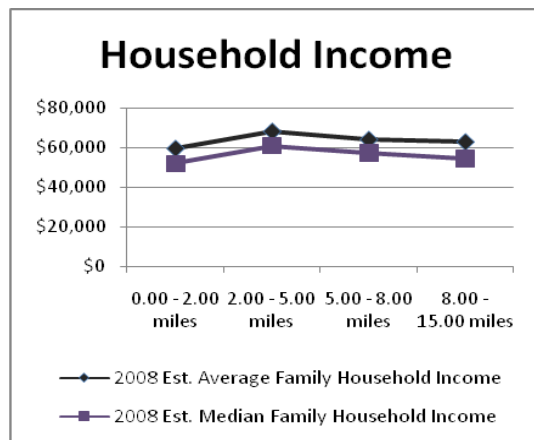


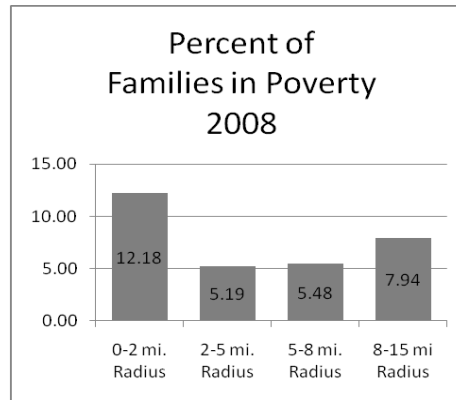
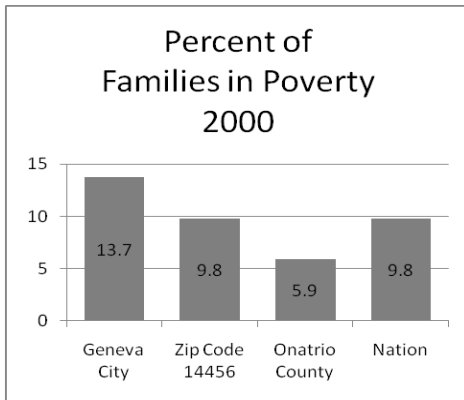
Exhibit 3. Household Income

poverty. The Clartias data shows an increase in poverty with increased distance from Geneva. In the most rural ring, 8-15 miles from Geneva the percent of families in poverty increases to 7.94%, these families represent the Rural Poor.

This Household income graph for the study area shows the expected urban to rural shift. Both measures of household income increase in the 2-5 mile radius range. This data can be interpreted to mean “households living in the suburbs of Geneva have more income than households in the City.”

- The highest household income is among residents in a 2-5 mile radius of the downtown area, with an average household family income of approximately \$68,000 and a poverty rate of 5%. This is followed by those living in the 5-8 mile radius with an AHI income of about \$64,000 and a poverty rate of 5.5%.
- The lowest income is among those living in the immediate proximity of the downtown, with an AHI of approximately \$60,000 and a 12% poverty rate
- The lower income level begins to increase again in the 8-15 mile radius with an 8% poverty rate, which reflect the surrounding rural area

Exhibit 4. Families in Poverty



HOUSING

The City of Geneva has a high concentration of renters and very dense housing, when compared to other rings of the study area. The percent of renters drops off quickly in the 2-5 and 5-8 mile radii, but rises again in the 8-15 mile radius.

- In the 0-2 mile radius of the downtown, there are 5,834 households; of which more than half are renter occupied.
- In both the 2-5 mile radius and the 5-8 mile radius, more than 80% live in single-family houses

Exhibit 5. Renters vs. Owners

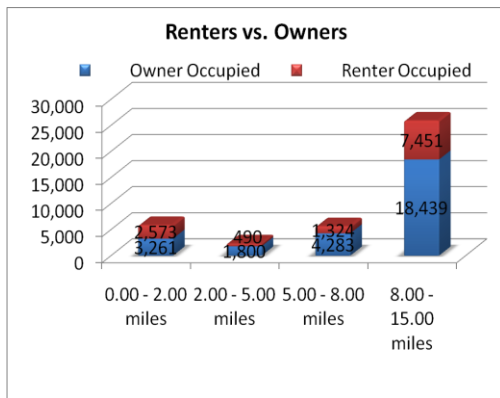
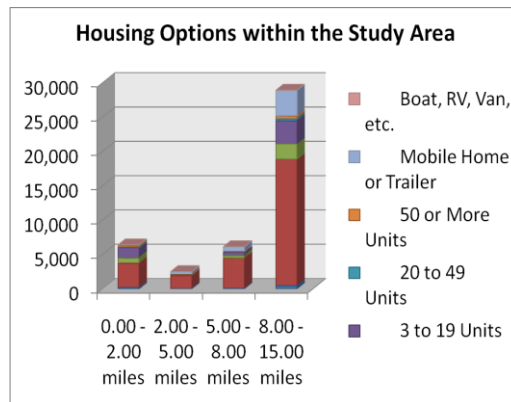


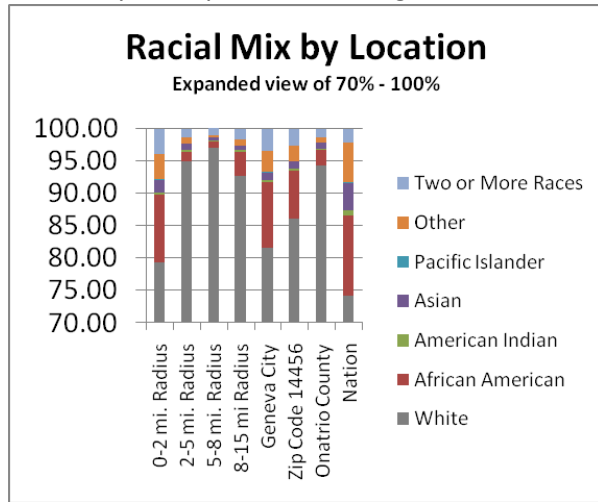
Exhibit 6. Housing Options



Geneva Full Occupancy Initiative

DIVERSITY

Geneva is a substantially diverse city. Unlike most other upstate New York cities, the racial composition in the City closely matches the figures for the nation. In the City proper, 81.5% of the population self

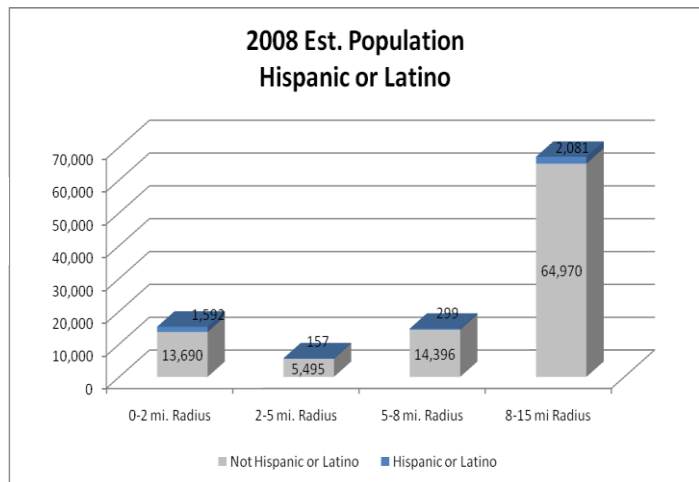


identifies as White, compared to 92%- 96% in the suburbs. The population of African Americans is 10 % in the City and approximately 1% in the 2-8 mile suburbs. The percentage of African Americans rises to 3.7% in the 8-15 mile suburbs of Geneva. The City of Geneva is home to 3.4% of residents who self identify as two or more races; this percent is higher than all the other areas studied (almost 1% higher than the national average).

Exhibit 7. Racial Mix by Location

Within the 0-2 mile radius, a significant number of people self-identify as Hispanic. The percent of Hispanics drops off quickly in the 2-5 and 5-8 mile radii, but rises again in the 8-15 mile radius.

Exhibit 8. 2008 Hispanic or Latino Population



CONSUMER NEEDS AND EXPECTATIONS

A telephone survey of 200 local and regional residents was conducted by KS&R in early 2009. In addition, 42 persons participated in focus groups during February and March 2009. The detailed results are contained in Appendix A. Below is a summary of the results of this consumer-based market research.

Shopping Competition

The shopping competition was identified as the Prime Outlet Mall in Waterloo, Eastview Mall in Rochester, downtowns of Canandaigua and Seneca Falls, WalMart and the strip malls along 5 & 20 between Geneva and Canandaigua.

Among all respondents, the most popular shopping area destinations are Prime Outlet Mall in Waterloo and the Eastview Mall in Rochester. However, the 3-8 mile radius residents report shopping at almost all of the local destinations including the strip malls, downtown Geneva, downtown Seneca Falls, and WalMart. Downtown Canandaigua is a frequent destination for the 8-15 mile residents.

Perception of Downtown Geneva as a Preferred Shopping Location

Participants were asked about their shopping habits and their perceptions of Geneva during the day and evening hours.

Downtown workers like to shop for furniture in downtown Geneva, and “over shop” as compared to the regional residents. However, among the consumer groups the Downtown Workers are the least likely to shop in downtown Geneva because their shopping needs are being taken care of by the strip mall shopping that provides ease, convenience and the desired merchandise mix. For the Downtown Worker, the most popular destinations are banks and credit unions, cards and gifts, and the Farmer’s Market. And, dining for both lunch and dinner is very popular among downtown workers. Downtown events and activities are an important motivating factor for the downtown worker to return on evenings and weekends.

Local residents are very pragmatic. Ease of access, business hours, safety and value are the most important factors for selecting a shopping area. Social activities are not as important as a motivating factor. The number one recommended improvement for the shopping experience by local residents is to have more business promotions and sales.

Among the 3-8 mile radius residents, there is a regular trend of habitual visits to strip malls on 5 & 20, downtown Geneva and the WalMart. This group will make occasional trips to Prime Outlet Mall and Eastview Mall in Rochester. This group also has a more positive attitude toward Geneva’s downtown than the other consumer groups. They think that safety, and the variety, price of merchandise and customer service is average or better than some other shopping options. Dining downtown is also popular among this consumer group.

Regional residents (9-15 mile radius) purchase the following items in a downtown setting, which is likely an expression of their higher household income: specialty foods, housewares, home accessories, and clothing and shoes. And this group is more strongly motivated to go to downtown Geneva, especially for arts related activities. This group has the same pattern with the major malls that is rare trips. However, on a regular basis this group visits WalMart and downtown Geneva more frequently than 5 & 20 strip mall stores. Approximately 40% of this consumer group believes Geneva is fair to poor in terms of safety and parking. They do not have a desire to dine out in downtown Geneva. However, this group gives high marks to customer service, price of goods, quality.

Among all the consumer groups, there is a preference for shopping in a local downtown (Geneva, Canandaigua, and Seneca Falls) for purchases involving furniture, wine, liquor, jewelry and entertainment destinations. Respondents reported shopping most frequently during the noon or lunchtime hours, and then again after 5 PM. And many people report that they do not shop in downtown Geneva over the weekend, but do come to downtown Geneva if there is an event or social activity.

The primary advantage of Geneva's downtown as compared to the strip malls on 5 & 20 is the one-stop convenience if the shopping is clustered and the parking is strategically located to support this. And according to the consumer-based market research Geneva is a great place to shop regardless of the weather as compared to the strip malls.

However, downtown Geneva is perceived as significantly less safe than the strip malls on 5 & 20 and the larger malls such as Eastview Mall. Also, downtown Geneva is considered "less easy" to access, presumably due to lack of adequate wayfinding. Both downtown Geneva and the 5 & 20 strip malls receive low ratings for services, everyday values and sales, business hours, and the mix of store merchandise.

All respondents to the surveys felt that the existing "service and professional" businesses in downtown Geneva are adequate to fill their needs.

However, there were clear gaps identified in the retail area ranging from shopping hours to merchandise. Specific gaps include:

- Moderately priced and trendy women's and men's clothing
- Artisans (interactive experience and products)
- Books and computers
- Specialty foods and beverages such as wine and liquor
- Bakery
- Moderate priced family sit-down restaurant is desired among all the consumer groups

- Regional residents and downtown workers, have a desire for ethnic foods (this group eats both lunch and dinner in downtown Geneva most often as compared to the other consumer groups)
- Entertainment options, especially waterfront activities, live bands and weekend entertainment, festivals and outdoor community events, Farmer’s Market, and presentations hosted by the colleges. There is an emphasis on family-oriented activities
- Classes such as knitting, crafts, etc.

Nearly 40% of those surveyed believe the mix of stores in downtown Geneva has improved during the past year. The most recognized new business is Mac’s Philly Steak.

In addition, the consultant performed a retail gap analysis based on data provided by Claritas that demonstrates consumer spending and the opportunities for new business development based on consumer needs. Below is a summary of this analysis.

CONSUMER EXPECTATIONS AND MOTIVATIONS

The consumer-based market research revealed that the primary shopping motivators are:

1. Location and ease of access
2. Everyday values
3. Mix of store merchandise
4. Safety
5. Customer services
6. Cleanliness and attractiveness of shopping area

These same persons rated Geneva against other shopping area opportunities including:

- WalMart Shopping Area in Canandaigua
- Eastview Mall in Rochester
- Carousel Mall in Syracuse
- Prime Outlet Mall in Waterloo
- Downtown Canandaigua
- Downtown Geneva
- Strip malls on 5 & 20 in the Town of Geneva
- Downtown Seneca Falls

This is how Geneva stacks up.

	Geneva Exceeds Expectations	Geneva Fairs About Average	Geneva Falls Below Expectations
Close to other stops such as banks, PO	X		
Mix of stores & merchandise			X
Everyday values			X
Services			X
Business hours			X
Recreation & entertainment	X		
Popularity (events)	X		
Stores of interest			X
Place for the whole family		X	
Fun place to shop		X	
Customer service		X	
Convenient parking		X	
Unique shops		X	
Brand names		X	
Place to walk or stroll about			X
Convenient shopping hours		X	

The most popular recommended activities for downtown Geneva include:

- More and different shops
- Family interests, most strongly desired by the 3-8 mile residents
- Safety and easy access improvements
- Parking (this is related to lack of understanding of where parking is located)
- Festivals and special events
- Waterfront activities, especially among the local and immediate area residents
- Arts and live performances
- Fewer bars and taverns

Walkability

A walkability study was conducted to assess several factors that influence the comfort and motivation of the consumer. The walkability assessment form and the mapping of the results are contained in Appendix H. Below are highlights of the conclusions drawn from the study.

Physical Infrastructure

Strengths	Weaknesses
Streets, sidewalks and alleys are in good condition and well maintained	
Lighting fixtures in good condition	No benches
Curbs and sidewalks are ADA compliant	Inconsistency in design and readability of street signs
Healthy trees	No "City Center"
Adequate off street, municipal parking that is well placed and free to the consumer	Other than Bicentennial Park, no public gathering areas
Historic buildings, several with façade improvements, and interior rehab underway	Bicentennial Park does not have large grassy area or shade trees. Not useable in winter months.
Good snow removal	Inconsistency in design and readability of street signs

The Place To Be

Strengths	Weaknesses
The Smith Opera House offers a wide range of entertainment, and quality live performances	Limited meeting and conference facilities and venues – limited to Ramada Inn
Hobart & William Smith Colleges	Active promotion of downtown Geneva as a place to meet to meeting planners, etc. is conducted by the county's conference and visitors bureau
	No gathering spaces
	Limited waterfront activities

Character and Charm

Strengths	Weaknesses
Clean streets, sidewalks and alleys	No art work (one mural on side of building – Exchange Street near Tillman)
Interesting lighting fixtures	No benches
Nice curbs and sidewalks – good condition and combination of brick and cement	Limited availability of information on the history of Geneva, and its beautifully preserved buildings such as The Smith Opera House, City Hall and Post Office
Wide sidewalks to accommodate high volume of foot traffic and out-door dining	No “City Center”
Several areas with trees, but are young and do not offer shade	Other than Bicentennial Park, no public gathering areas
Façade improvements on several historic buildings	Bicentennial Park does not have large grassy area or shade trees. Not useable in winter months.
Good directional signage to municipal parking	Large number of vacant storefronts
Downtown is a clustering of buildings and lacks charm and character	Dirty storefront windows
	Unattractive store windows, with a few exceptions. No themes, and merchandise displays are not interesting
	Several bars – noisy at night for upper story residents
	No signage off Route 14 or Routes 5 & 20 directing people to retail district
	No signage within the downtown district directing people to major destination such as City Hall, Post Office, The Smith Opera House, etc.
	No signage to “move foot traffic” throughout downtown
	No banners, flags or signage that provides a “Welcome to Geneva”
	Architectural design of buildings is a mix of historic and contemporary, and lacks consistency from block to block
	Lack of consistently business signage on buildings

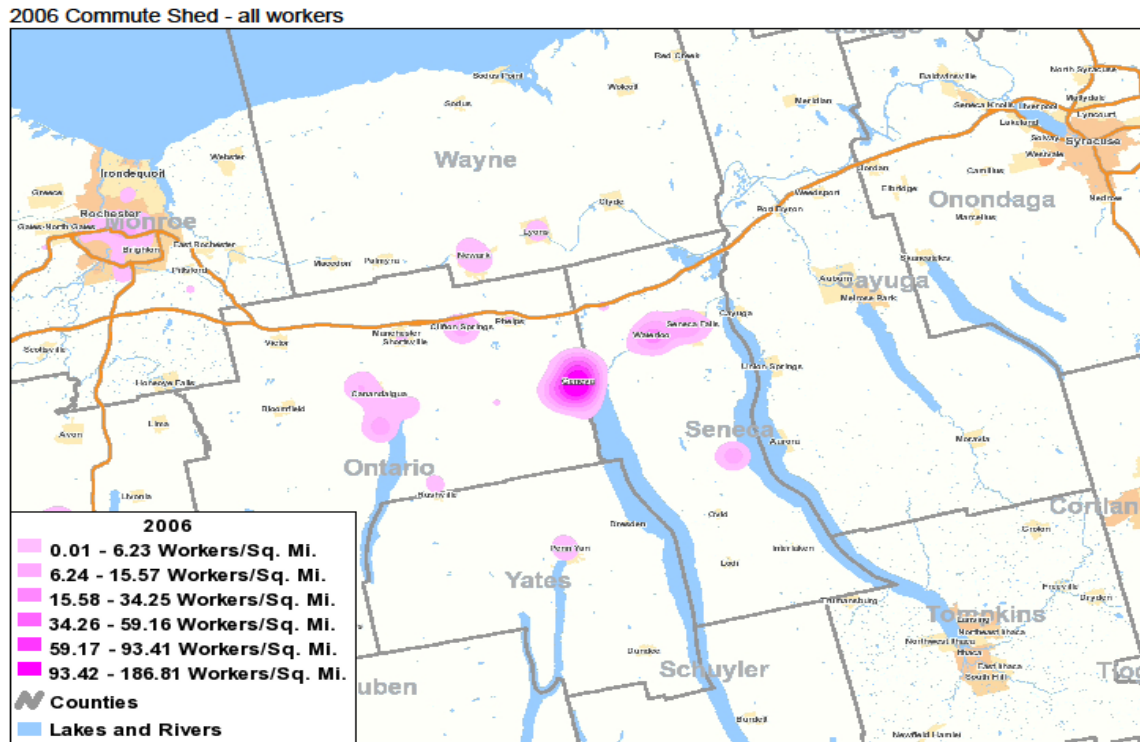
Downtown charm should be about walking up and down tree-lined streets and stopping to browse, enjoying displays in shop windows and admiring the details of interesting and unique historic buildings. Successful downtowns are those that offer a walk through a nostalgic place and shopping that is about finding both practical and unusual things.

Landmarks of a former time are also a part of an interesting downtown, including the beautifully restored Smith Opera House, the City Hall and the Post Office. But the consumer needs to be led to these buildings and then provided with information about the history and character is these buildings.

Commute Patterns

Although some residents who live in Geneva commute as far away as Rochester, the vast majority work in or near Geneva. There is a strong commute corridor and line of connection between Geneva, Canandaigua, Waterloo and Seneca Falls.

Exhibit 9. Commute Patterns



Analysis of Seasonal Residents

Students

- College Enrollments: Hobart & William Smith Colleges have 2,000 students, 90% of whom live on campus. Finger Lakes Community College has 850 students.
- FLCC is planning a \$12 million expansion project
- College students (especially college freshman) are the largest back-to-school spenders
- College students have 25% more disposable income today than in 2005
- Most popular consumer items: laptops, cell phones, digital cameras, clothing and distinctive dorm furniture
- Most college students buy back-to-school at: * Discounters (51.5%); Department stores (41.8%); Office supply stores (35.6%); Electronics stores (20.9%); and, nearly 1/3 shop online for back-to-college necessities
- Students living on-campus outspend others *
 - > Dorm dwellers \$1,078.14
 - > Students living at home \$490.74
 - > Students living off-campus \$790.78
- Freshmen spend an average of \$1,193.60 each
Sophomores spend the least, with an average of \$748.29

Sources:

- NRF 2007 Back-to-College Consumer Intentions and Actions Survey
- National Retail Federation 2007
- Short Woman: Market, Business, and Economy

Analysis of the Traveling Shopper

Popular Activities for Wine & Culinary Enthusiasts and Heritage Tourism Enthusiasts

	<u>Wine/Culinary</u>	<u>Heritage Tourism</u>
Local arts & crafts studios	76%	79%
History museums	61%	81%
Art galleries	61%	66%
Farmers markets	53%	68%
Local festivals or fairs	51%	67%
Historic sites/replicas	47%	63%
Theatre	59%	57%
Golf	35%	27%
Fishing	32%	53%
Hike/backpack	31%	38%
Cycling	30%	33%
Canoe/Kayak	28%	24%
Theatre festivals	19%	17%

Finger Lakes Tourist Profile

Average age: 48	Occupation: retired, professional, mid-level professional	
Gender: 30% male 70% female	Education: 84% = college to graduate school	
Average household income	Generation:	
\$80,000 (30% are \$100,000 +)	<ul style="list-style-type: none"> • 80+ <1% • 62-79 14% • Baby Boomer 44-61 51% • Gen X 23-43 34% • Gen Y 4 – 22 <1% 	
Primary home: NY, PA, NJ, OH, MI	Place of lodging: 58% hotel/motel 19% B&B 11% Camping	
Stop at visitor center for info:	Most popular activities:	
51% = fairly often 25% = frequently	78% shopping	
	73% winery	
	65% driving/sightseeing	
Average length of stay: 3.24 nights	Average spending for shopping on a day trip: \$115	
	Average spending for shopping on a leisure trip: \$60.27	

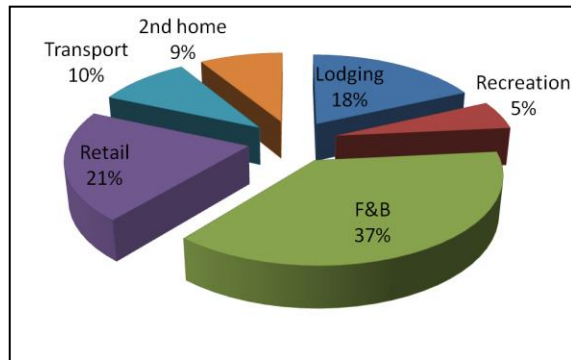
Exhibit 10. Finger Lakes Tourist Satisfaction Survey

Criteria	2006 Mail Survey Average Rating	2006 Intercept Survey Average Rating
Overall Visit	4.53	4.17
Overall appeal of the wineries	4.40	4.47
Overall appeal of the attractions	4.22	3.98
Ease of finding visitor information	3.99	4.12
Quality of the lodging rooms	3.96	4.30
Signage and wayfinding	3.93	3.89
Level of service/employee training	3.92	4.28
Lodging value	3.82	4.28
Overall appeal of shopping areas	3.77	3.97
Range of choices for dining	3.69	3.67

Exhibit 11. Finger Lakes Tourist Market Mix

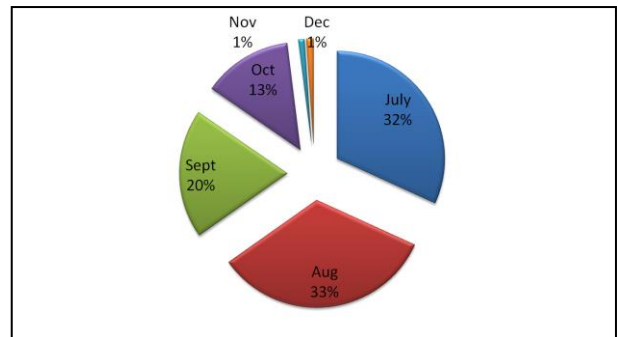
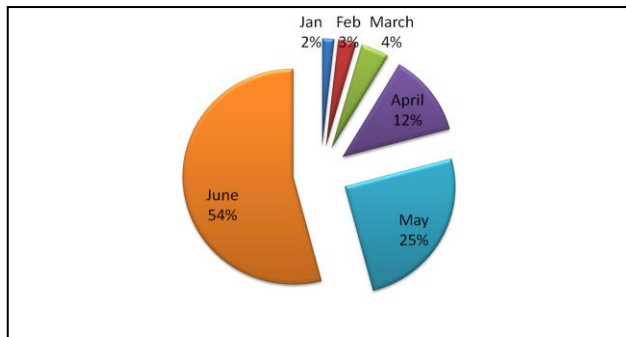
Market Segmentation	Percentage
Corporate/Individual Business	36%
Conventions/Meetings	7.21%
Large conventions/meetings	3.71%
Small conventions/meetings	3.50%
Leisure Segments	46.72%
Leisure	24.44%
Group tour/motorcoach	4%
Weddings/reunions	11.07%
Visiting/friends/relatives	7.21%
Other Segments	22%
Sports	6.36%
College/university activities	6.71%
Overnight as part longer trip	6.50%
Other	2.43%

Exhibit 12. Tourism Spending in Ontario County



Source: *Economic Impact of Tourism in NYS, Finger Lakes Focus*; Aug 2008; Tourism Economic

Exhibit 13. Visitation Cycles of Geneva Tourists



Visitors to Geneva Visitor Center

Number of Visits Annually	
2008	4,541
2007	5,899
2006	5,392

Purpose of Visit	
Vacation	45%
Wineries	21%
Family	8%
Wedding	3%
Cycling	3%
Misc	18%

Destinations and Attractions

- Information center, with funding to expand and enhance it
- Wine country and strong affiliation with the Finger Lakes Wine Trail
- Seneca Lake waterfront, with beautiful park and potential for waterfront retail activities
- The Smith Opera House
- Hobart and William Smith Colleges
- Festivals and events
- Organizations committed to the arts: Geneva Arts Development Council and Hobart and William Smith College
- The Smith Opera House and new theatre facility planned for the college campus
- Performing arts schedule
- Nationally recognized artists, speakers and personalities

Retail Trends and Consumer Demand

- Shopping Centers will continue to develop and expand, especially lifestyle centers, power centers, and mixed-use projects with a retail component
- Malls will continued to re-invent themselves as mixed-use communities
- On-line shopping continues to gain momentum
- Food drives retail
- “Shoppertainment and dinertainment” are what people are looking for in a trip to a downtown
- Consumers want to “seize the moment”: opportunities to slow down, live in the present, savor the moment
- Consumers are looking for ways to gain efficiency: drive-by dining; mobile banking; less time in giant malls; good services
- People have enough “stuff” so are looking for experiences not products ... especially women. Examples: cooking courses, Ferrari drives, etc.
- Consumers are searching for intangibles that make life richer and worth living ... like stories, relationships, family
- Destination retail is an important factor for a rural downtown
- There is growth in “wine, culinary and heritage tourism”
- Heritage enthusiasts are forecasted to grow from 36% in 2000 to 47% in 2025
- Wine/Culinary enthusiasts are forecasted to grow from 5% in 2000 to 7.5% in 2025
- The traveling shopper is seeking a leisure experience that also includes intellectually stimulating yet relaxing activities such as sampling visual and performing arts, cooking and wine schools, unique gardens and park areas, local interests and heritage
- The traveling shopper is looking for a high quality visual and personal experience that is “authentic” ... quality and personalized accommodations, destination dining, exemplary customer service, unique historic landmarks and experiences, celebration and interpretation of local culture and heritage, clean/safe downtown, interaction with local people such as wine-makers, artisans and craftsman, etc.

Retail Gaps and Opportunities

A retail analysis was conducted using data obtained from Nielsen Claritas Direct Marketing Information. The Claritas Consumer CLOUT database provides estimates and projections of household expenditures on more than 500 specific goods and services. This data is based on statistics collected by the US Department of Commerce. The relevant data used in this project includes: general population figures, economic data for the population, household expenditures and retail sales.

The existing and potential “capture rate” for specific retail goods and services within the market area was analyzed. This information was used to determine the unmet retail demand and opportunities to fill the retail gaps. The immediate and surrounding retail market was evaluated to determine its potential for growth. This analysis included the local, or primary market, as well as, a secondary market. It included an analysis of spending patterns to determine the proportion of activity could be captured by downtown Geneva. The detailed data is provided in Appendix B.

The Retail Gap analysis shows that there is retail potential in several major retail sectors. Through selective recruitment to fill these gaps, Downtown Geneva can increase the variety of merchandise, increase foot traffic, and reduce the number of vacant storefronts.

Physical Constraints

The physical constraint of building size is a limiting factor in the retail gap analysis. Some well known retail operations are ‘one-stop-shopping’ destinations; that business model can only be implemented when vast development sites (20+ acres) are available. Geneva’s downtown does not have an inventory of buildings/sites large enough to satisfy these retail giants.

Potential for New Businesses and/or Merchandising in the Downtown

The following retail market segments are underserved in the vicinity of Geneva. The retail potential in these markets is generally greater than \$1,000,000 dollars across the 0-2 mile radius and greater than \$4,500,000 across the entire 15 mile radius; these businesses can also be located in the footprint of a shop in the Geneva retail business district. These retail market segments were given consideration in developing the targeted categories for tenant recruitment and expansion to meet consumer needs.

- Full Service and Family Destination Restaurants- (the only exception to the above criteria) Consumers in the 0-2 mile radius (the city core) represent a potential demand of approximately \$400,000 in additional restaurant choices. However, the areas surrounding Geneva have a strong unmet need for full service restaurants. A restaurant opening in the Geneva BID can expect to draw some portion of the \$3.4 million dollars of pent-up demand in the 2-5 mile radius around the City. In the 5-8 mile radius the total value of un-served retail potential is \$8.3 million. Across the 15 mile study radius, the retail gap for restaurants is more than \$10 million. According to the phone survey, the most requested type of restaurant is a moderately

priced/ family style sit down restaurant. Those surveyed as a part of this study recommended several well-known restaurant chains (The Olive Garden, TGI Fridays, and Applebees).

- Hardware- Consumers in Geneva and the surrounding areas are underserved by existing hardware stores. The expansion of an existing business with hardware in the Geneva downtown retail district could expect to draw some portion of the \$1,634,000 demand in the 0-2 mile radius from the city centre and an additional \$732,000 demand in the 2-5 mile radius around the City. In the 5-8 mile radius the total value of un-served retail potential is \$800,000. Across the entire 15 mile study radius the retail gap for hardware is more than \$7.8 million.
- Household Appliances and Accessories- Consumers in the area surrounding Geneva are underserved by existing Household Appliances retailers. Expansion of home furnishings and accessories opening in the Geneva BID can expect to draw some portion of the \$1.9 million dollars of pent-up demand in the 2-5 mile radius around the City. A small retail operation could attempt to capture some of that retail potential. In the 8-15 mile radius the total value of un-served retail potential is \$12 million. In the 13 mile study radius around the City of Geneva the retail gap for furniture and home accessories is more than \$14 million.
- Computers and Software- More than 50% of the phone survey participants (with an opinion) requested increasing the local supply of electronics. Consumers in the areas surrounding Geneva are underserved in the Computers and Software category. A business offering this type of merchandise in the Geneva downtown retail district might expect to draw a portion of the \$800,000 of pent-up demand in the 0-2 mile radius around the City and also some portion of the \$1,400,000 of unserved demand in the 2-8 mile radius. In the 9-15 mile radius the total value of un-served retail potential is \$2.7 million. Across the 13 mile study radius around the City of Geneva the retail gap for computers is more than \$6 million. However, it is recommended that additional market research be conducted in this area to assess the competition presented by on-line purchases. It is computer related services that exerts the highest level of demand.
- Sporting Goods- Consumers in the City and areas surrounding Geneva are underserved by existing sporting goods suppliers. Forty percent of the phone survey participants recommended a Sporting Goods Store in downtown Geneva. A sporting goods store opening in the Geneva retail district might expect to draw some portion of the \$762,000 of un-met demand in the 0-2 mile radius, along with some of the \$465,000 of pent-up demand in the 2-5 mile radius around the City. In the 5-8 mile radius the total value of un-served retail potential is \$1.3 million and \$2.7 million in the 9-15 mile radius. Through the entire study area (including the City of Geneva) the retail gap for sporting goods is more than \$5.4 million.

- Beer/ Wine/ Liquor- Consumers in the areas surrounding Geneva are underserved in the Beer/ Wine/ Liquor category. The results of the phone survey indicate that the consumers are satisfied with the number of Beer/Wine/Liquor stores in downtown Geneva; however the retail gap analysis for the, 0-2 mile radius, shows a retail gap of \$1,000,000. This apparent disconnect may be a consumer preference for a greater variety of alcoholic beverages. In the Geneva downtown retail district, a Beer/ Wine/ Liquor store that expands its product line could expect to draw some portion of the \$474,000 of the unserved demand in the 2-5 mile radius around the City. In the 5-8 mile radius the total value of un-served retail potential is \$1.1 million. Through the entire study area the retail gap for alcohol is more than \$4.5 million.

Recommended Product Line Expansion

The following retail market segments are somewhat underserved in the vicinity of Geneva. While the retail potential in these markets is greater than \$100,000 dollars in the 2-5 mile radius alone, that potential appears insufficient to support the operations of an entire storefront. The market areas recommended for product line expansion are underserved at almost every radius (2-5, 5-8, and 8-15).

- Paint and Wallpaper- Demand for paint and wallpaper is somewhat unmet locally. Approximately \$150,000 (0-2 miles) and \$210,000 (2-5 miles) of un-served retail demand exists in and around the City of Geneva. Un-met demand in the 5-8 mile radius is in excess of \$500,000. In the study area (a radius of 15 miles from the City Centre) the total retail gap is \$1,600,000. Existing retailers could attempt to capture a greater portion of the market share, especially by attempting to capture some of the 'Green' niche market (low VOC paint, recycled content wallpaper).
- Hobbies, Toys, and games- Demand for toys, games and hobby supplies is somewhat unmet locally. Demand in the City Center (0-2 mile radius) is greater than \$550,000. Approximately \$260,000 of un-served retail demand exists in the 2-5 mile radius. Retail demand for Hobbies, Toys, and Games is being satisfied by the supply in the 5-8 mile radius. In the 9-15 mile radius, demand again exceeds supply, the retail gap is more than \$2,000,000. Total unmet demand in the 15 mile study area is nearly of \$3 million. Existing retailers could attempt to capture a greater portion of the market share.
- Books- Demand for books is slightly unmet locally according to the retail gap analysis and the phone survey results; more than 50% of the phone survey participants would like additional retail options for books. Within the 0-2 mile radius there is approximately \$270,000 of unmet consumer demand; \$170,000 of un-served retail demand exists in the 2-5 mile radius. Un-met demand in the 5-8 mile radius is in excess of \$400,000. Total unmet demand in the 15 mile study area is slightly greater than \$1.25 million. Existing retailers could attempt to capture a greater portion of the market share.

- Clothing – Although the market for clothing and shoes in the area surrounding the City of Geneva, there is demand for boutique clothing to meet the college student demand.

Saturated Retail Markets

Even limited expansion in these areas will not be rewarded by a corresponding increase in sales. The market for brand name clothing and shoes around the City of Geneva is completely satisfied by a great variety of retail options in the 9-15 mile radius; retail expansions in the clothing and shoe categories are not recommended. The market for health and personal care products is saturated at all radii. Consumer purchasing power is already maintaining a sufficient number of conventional gasoline stations, further increases in the number of stations should be avoided. The market around Geneva is saturated with automotive retailers and parts suppliers. Office supplies are abundant in the City, along with gifts/souvenirs, additional expansion into these areas is not recommended.

It is recommended that no development take place in the following retail categories.

- Gasoline stations
- Gift and novelty
- Auto repair and auto parts
- Brand name clothing chains
- Shoe stores
- Jewelry
- Luggage and leather
- Used merchandise (other than high end consignment)
- Personal care (hair care, massage, etc.)
- Taverns/bars/pubs

Target Consumer Groups

It is recommended that the following consumer groups be targeted in all advertising and promotions.

- | | |
|---|--|
| • Area residents (0-8 mile radius) | 25,000 |
| • College student and staff populations | 4,000 |
| • Immediate downtown workers | 500 |
| • Employees in immediate surrounding area | 3,000 |
| • Seasonal residents | 2,500 |
| • Regional residents (15-25 mile radius) | 75,000 |
| • Traveling shoppers | 5,000 (potential for additional 20,000/yr) |
| • Regional patrons of the arts | |

Recommended Business Mix Balance

Based on the retail gap analysis, tourism data analysis, and consumer-based surveys, it is recommended that Geneva’s downtown tenant mix be adjusted as follows.

Exhibit 14. Striving for a Balance in the Business Mix			
<u>Existing Retail Mix</u>		<u>Recommended Target Business Mix</u>	
Lodging	1%	Lodging	2%
Culture and Entertainment	1%	Culture and Entertainment	3%
Dining/Bars/Taverns	12%	Dining/Bars/Taverns	14% (emphasis on destination dining)
Retail Shopping	31%	Retail Shopping	32%
Professional/Service	55%	Professional/Service	49%



Business Development and Restructuring Strategies

1. ***Establish a “one stop” for existing and new businesses***
2. ***Target Customer Groups.*** Target the various customer groups through advertising and all communications, merchandise inventory, and business recruitment:
 - Residents in the 0-8 mile radius
 - College students, administrators and faculty
 - Seasonal residents
 - Traveling shopper
3. ***Protect Competitive Edge:***
 - Develop early warning system to identify declining businesses (assistance early) protect job base
 - Track data and retail trends
 - Encourage doing business locally and reinforce community benefits
 - Encourage expansion of existing businesses and promote assistance tools to help: Venture Forums and business assistance counseling (directory)
 - Keep awareness by celebrating success stories/PR
4. ***Strive for a Balanced Business Mix through Business Development*** (Exhibits 14 on page 41)
 - Grow Your Own: Meet individually with strong businesses to identify opportunities for expansion or diversification of their merchandise inventory to be in closer alignment with consumer needs and expectations in the target business recruitment categories.
 - Tenant Recruitment: Undertake a business recruitment effort, targeting businesses in key categories. Base the recruitment effort on a clustering approach and using tools such as sophisticated recruitment collateral, updated website, branding, property data base, etc. (see p 43-44)
5. ***Develop an Annual Work Plan.*** Targets for retail mix, and retention, expansion and recruitment effort
6. ***Retain and Strengthen Existing Businesses.*** Work with businesses to enhance their image through signage, window merchandising, and website development. Conduct business improvement seminars (Needs and expectations of the customer groups. Financing available for expansion and new business development. How to prepare for disaster.). Provide one-on-one counseling to struggling businesses. Bring businesses and the community together. Examples: Pair merchants and school classes ... a merchant adopts an elementary class; students decorate store window for Halloween, etc.
7. ***Reposition Existing Businesses.*** Continue to work with business owners and retailers in each cluster to develop retail shops, brands, and products that will enhance their business success. Meet with clusters of businesses that have the best opportunities for cross-promotion and joint marketing efforts; and explore ways to pool resources to promote their businesses to common target market groups.
8. ***Continue to work with banks and other lending programs*** to make certain low interest loans and other support programs are adequate to support business development.

Exhibit 15. Tenant Recruitment Targets

Targets for Food, Beverage And Entertainment	Targets for Retail Storefronts
Bakery	Home accessories
Beer/wine/liquor sales	Artisans and interactive arts
Destination restaurants: “authentic” ethnic (Thai, Mexican, Indian); shop offering bagels, deli meats/cheeses and sandwiches	Boutiques, trendy clothing and accessories targeted as college students such as vintage /used clothing , and designer jeans & T-shirts n the “below ground” retail spaces
Water-front: water-related sporting and water-uses businesses	Retail & support services: books (expansion of existing business); computer & software; sporting goods; home improvement; paint & wallpaper (especially the “green niche”); sewing/needlework/piece goods; healthcare (aging population); shoe repair; alterations; shipping
Microbrewery	Boutique fitness
Packaged specialty foods	Galleries and antique stores
Outdoor dining (existing and new businesses)	Day spa
Family fun destinations: movie theatre, David & Busters type venue including dining/entertainment	Wine related retail and tasting
Expansion of existing businesses with offerings such as Ice cream	Finger Lakes focus – arts, crafts, wines, etc.
Water and wine themed museums and/or interactive centers	Retail related to potential development of a boating museum and visitor interactive center
Art gallery or other cultural destination that has name recognition and affiliation with an established entity such as Hobart and William Smith Colleges	

Retail Tenant Recruitment Strategies

1. Create and maintain current and accurate internal databases such as:
 - Properties available for lease including property photo, tax parcel number, current property taxes and BID assessment, property description such as square footage and condition, owner/landlord contact information, lease rate and terms, etc. See sample in Appendix I. Sample Databases.
 - Properties available for sale
 - Retail mix
 - List of businesses by category
 - Retail target recruitment categories
2. Identify best locations for business development based on the best clustering of complementary businesses and consumer foot traffic, and property development initiatives
3. Know local markets, business clusters, and development opportunities and promote accordingly
4. Partner & leverage outreach collateral and materials with valued community partners: Chamber, business and trade associations, commercial real estate agents, and local businesses
5. Nurture regular communication with the commercial brokerage community to facilitate leads
6. Develop and launch an aggressive communication and promotion program
7. Develop recruitment collateral that demonstrates Geneva's competitive edge:
 - Evidence of consumer demand and motivations based on local and regional market studies
 - Reinforce downtown's strengths & vision (also refer to more details in various websites)
 - *Lease Rate Comp Sheets* for surrounding areas (web/hard copies)
 - Simple "Tips for Success" Permit Overview Materials
 - Business "Who's Who" list highlighting local business clusters, and individual business profiles to demonstrate critical mass
 - Examples of Geneva's Downtown Business Success Stories
 - Top 5-10 Reasons to Locate a Business in Downtown Geneva; i.e., downtown revitalization program, competitive lease rates, financing, waterfront, tourism, festivals/events, supportive community environment (Chamber, City of Geneva, SBDC, etc.)
 - Package: demographics, unique incentive programs (federal, local, state), festivals and events, targeted development opportunities
8. Have a dynamic web offerings
 - Step-by-Step How to Start a Business
 - Online Property Database
 - Business Resources/Tenant Directories/Maps



Locating Retail Businesses ... *Do's and Don'ts:*

- Don't locate clothing stores next to restaurants.
- Do locate clothing on south side of street to avoid fading.
- Western exposure can be bad for restaurants; consider whether the setting sun is actually an enhancement.
- Restaurants can prosper on side streets—do not rely on drop-in business.
- Locate service shops at outer edges of downtown, where they are easily reached by car or foot.

Business Promotion

RESEARCH UNDERTAKEN

1. *Consumer-based market research (KS&R consumer-based market research, focus groups, interviews)*
 2. *Benchmark communities*
 3. *Walkability Study*
-

Business Promotion Strategies

1. ***Package and Promote Destination and Entertainment Venues that Leverage Community Assets*** including Lakefront, Arts, Wine and Education (*see Exhibit 3. Create Destination Infrastructure*)
2. ***Clean Windows.*** Work with merchants and property owners to maintain clean windows.
3. ***Fill Vacant Storefront Windows.*** Work with Hobart and William Smith Colleges for student design and photo exhibits in vacant store front windows. Use storefronts to portray community history and culture
4. ***Retail Store Window Merchandising.*** Work with Hobart and William Smith Colleges and existing businesses to have students design window displays around the four seasonal themes. College students would work with GBID on theme and design/creation of objects. Further, a team of college students would work with store owners in assembling the window displays.
5. ***Service Component.*** Encourage businesses to add a service component to complimentary to their merchandise sales.
6. ***Develop and implement a Shop Local Campaign***
7. ***Create a Welcoming Atmosphere.*** Encourage business owners to open doors in nice weather; post “open” or “welcome” flags that are consistent in color and design; and place potted plants at door fronts
8. ***Welcome Out-of-town Visitors from Colleges and Hotels.*** Example: Work with HWS to promote and support athletic events, such as welcoming “visiting teams” and recognizing home team wins/accomplishments
9. ***Pursue Cross-marketing Opportunities.*** Examples: Meet with clusters of businesses that have the best opportunities for cross-promotion and joint marketing efforts; explore ways to pool resources to promote the businesses to common customer groups. Explore cross-marketing opportunities with The Smith Opera House
10. ***Conduct Promotion Events Targeted at College Students.*** Examples: Organize an event on HWS campus to promote/display merchandise (currently being done by Earthly Possessions).

Property Development

RESEARCH UNDERTAKEN

1. *Inventory of existing buildings*
 2. *Inventory of 1st floor uses*
 3. *Inventory of upper story usages*
 4. *Anchor building, upper story occupancy, and property development mapping and analysis*
 5. *Assessed value of anchor buildings*
 6. *Benchmark communities*
 7. *Lakefront and Downtown Master Plan (Bergmann & Associates 2009)*
 8. *The Neighborhoods of Geneva, NY Study(czbLLC 2009)*
 9. *Walkability Study (2009)*
 10. *Parking analysis (2009)*
 11. *Feasibility Study and Business Plan for a Finger Lakes Visitor Center*
-

Assumptions

Area shopping malls and strip retail development surrounding the Geneva area are homogenous and predictable to the consumer. They have few distinctive characteristics that differentiate one from another. This is where Geneva's retail district has the potential to excel. The community's unique buildings, and clean and attractive streetscape all contribute to providing the consumer with insight to Geneva's unique community heritage, values, destinations, and attractions. If presented right, this is what can attract the consumer by distinguishing the downtown from the malls. The distinctive and unique shopping experience that, when combined with effective retailing, product offerings, and marketing, can lead to success.



Property Development Strategies

1. ***Anchor Building Usage and Financing Strategies.*** Identify uses and financing packages for target anchor buildings, and work with property owner to develop a tenancy and ROI business plan for each targeted building. Work with the City, financial institutions and investment funds to develop financial plans on select buildings to leverage private investment using sources such as state and federal grants (NY Main Street and Restore NY), property tax incentives such as 485 (b) and 444 (a), Federal and NYS Historic Tax Credits, etc.
2. ***Upper Story Housing Development.*** Encourage the City of Geneva to modify the existing Housing Code to permit expanded and high quality residential development on the upper stories of downtown buildings; and work with property owners and developers to develop quality upper story housing projects.
3. ***Support and Encourage Private Investment in a Community Renaissance.*** Work with financial institutions, private developers and investment funds, the major employers such as Geneva Hospital and Hobart & William Smith Colleges, and the City of Geneva to develop a plan to take advantage of the wave of young ***urban homesteaders*** who are seeking a “downtown neighborhood” environment, and are interested in restoring old building for residential use, and supporting downtown business.
4. ***In-fill Development:*** Work with City and developers to pursue in-fill development, some of which is recommended in the recent Lakefront Master Plan . Examples: new hotel and other lodging, new condo development, Farmer’s Market Enhancements, Exchange Street Theatre enhancements, and Intermodal Transportation Feasibility Analysis.
5. ***Business Plan for Tenancy.*** For each building that is renovated with federal or state funding there should be a business plan that includes a business recruitment and full building tenancy strategy.
6. ***Cluster and Incremental Development on Targeted Signature Blocks.*** Continue to support and promote investment in the redevelopment and preservation of buildings based on “best use” using a “cluster and incremental development” strategy. Good example is Linden Street, which could provide an interesting setting to promote the City’s historic character, support business clusterings such as the arts and high-end crafts, establish pedestrian promenade, and create a sense of charm. Priorities are shown on Map 1 displayed in Appendix F. The top two priorities include Castle Street between the railroad track and Exchange Street, and Linden Street between Castle and Seneca Streets.
7. ***Pace Development.*** Be cautious not to let building rehabilitation outpace business development, because the property investment could cause rent levels to exceed demand.
8. ***Create Investment Funds.*** Urge entities such as Geneva Growth to create independent investment funds for the development of targeted signature block projects (such as Linden Street) and anchor buildings such as The Dove Block.
9. ***Recognize Investment.*** Present annual awards to property owners that have made the greatest impact on the commercial revitalization of the downtown retail district.
10. ***Design Guidelines.*** Encourage City to adopt design guidelines for building signage, façade improvement and new construction.

Exhibit 16. Destination Infrastructure that leverages assets such as proximity to wine trail and Seneca Lake, and also attracts the “Culture Seeker”

Work with the colleges to develop educational institutes on popular topics that would be offered to the public in the form of regular meetings or forums (example: Aspen Environmental Forum)

Encourage the Chamber of Commerce, the Smith Opera House, Hobart & Williams Smith Colleges and other stakeholder groups to work together to package and promote destination and entertainment venues. Examples: Saratoga Springs holds events in tribute to its horse racing history, and has numerous statues of horses on the sidewalks in the downtown area; the Ithaca BID works with colleges to produce Darwin Days and Winter Recess; and, Ithaca works with City, business community, colleges, arts community and tourism industry to celebrate public “School Teachers Festival” during the President’s Week school break.

Work with the City and other stakeholder partners to develop landmark heritage and cultural attractions such as museums and interpretive centers that provide education, information and entertainment as a “gateway into the Finger Lakes” examples: Boating Museum, Finger Lakes Wine Visitor Center, Ecological Interpretive Center (as suggested in the Lakefront/Downtown Development Plan prepared by Bergmann & Associates)

Conduct a feasibility study on the development of a multi-functional facility or “culture center” that could also serve as an “embassy” for the northern entrance to the Finger Lakes ... learning center, conferences, indoor & outdoor interactive displays, theatrical/musical performances, art and sculpture exhibits, cooking and wine education/school, community gathering

Enhance the Farmer’s Market

Work with restaurants and City of Geneva to develop outdoor dining that is attractive and offers a “café” feeling

Encourage the City and Chamber of Commerce to complete a Wayfinding and Gateway Design Study

Encourage the City to improve the utilization the Seneca Lake waterfront for water-dependent and water-enhanced uses, that could then provide an opportunity for new water related retail businesses

Physical Infrastructure

RESEARCH UNDERTAKEN

1. *City of Geneva zoning and ordinances*
 2. *2005-2009 Property development efforts*
 3. *Anchor building inventory and analysis*
 4. *Benchmark communities*
 5. *Walkability Study*
 6. *Lakefront Master Plan (Bergmann & Associates 2009)*
 7. *Consumer-based market research*
-

Physical Infrastructure Strategies

1. ***Create an Environment that is Human-scale.*** Work with the City and Chamber of Commerce to develop techniques such as banners to create “eye stops” to prevent the pedestrian’s eyes from traveling up to the upper stories.
2. ***Enhance Streetscape.*** Encourage the City to make streetscape improvements such as street art, benches, etc.
3. ***Develop Gateway Plan.*** Encourage the Chamber and City to develop a “gateway” plan (as recommended in Exhibit 3. Destination Infrastructure)
4. ***Create community gathering places*** ... even if they are temporary until permanent ones are created. Encourage the City to work with the GBID, the arts and other stakeholder groups to create such spaces. Examples: Artisan exhibits under tents; close-off streets for block parties or special events; encourage social and cultural organizations to hold events in the downtown. And, encourage the City to complete a Downtown Geneva Microparks Feasibility Study as recommended in the Lakefront/Downtown Development Plan (Bergmann & Associates).
5. ***Inter-Modal Transportation Feasibility Analysis.*** Encourage the City of Geneva to complete a feasibility analysis for a potential rail/bus station as listed in the Lakefront/Downtown Development Plan (Bergmann & Associates).
6. ***Connection with the Lakefront.*** Encourage the City of Geneva to undertake the recommendations in the Lakefront/Downtown Development Plan (Bergmann & Associates); specifically, those recommendations focused on reducing the impacts of Routes 5/20, and activities that would visually and physically connect the downtown and lakefront areas such as the Cultural Walk, sculpture, etc.
7. ***Conduct an annual Safety and Walkability Audit.*** Conduct a routine evaluation of convenience and accessibility factors for consumers, downtown workers and residents (parking, lighting, snow removal, etc.)

Preservation and Design

RESEARCH UNDERTAKEN

1. *City of Geneva zoning and ordinances*
 2. *2005-2009 Property development efforts*
 3. *Anchor building inventory and analysis*
 4. *Benchmark communities*
 5. *Walkability Study*
 6. *Lakefront Master Plan (Bergmann & Associates 2009)*
 7. *Consumer-based market research*
-

Preservation and Design Strategies

1. ***Stimulate Investment to Preserve Historic Character.*** Continue to support and promote investment in the redevelopment and preservation of historic buildings in ***select blocks and targeted cluster areas.*** Urge the City to consider adopting property tax incentives such as NYS 444 a.
2. ***Sign Design Guidelines.*** Work with the City of Geneva to develop Sign Design Guidelines
3. ***Building Design Guidelines.*** Work with the City of Geneva to development Building Rehabilitation and Façade Improvement Design Guidelines
4. ***A Community with Character and Charm.*** Create interesting retail areas that also provide opportunities for gathering spaces and retail clusterings. Prime example is Linden Street, which could provide an interesting setting to promote the City's historic character, support business clusterings such as artisans, and be the first step in creating pedestrian promenades that are key to a sense of charm.
5. ***Exhibit and Celebrate the History and Culture of the City.*** Identify various ways to stimulate community pride and create an interesting destination for visitors by developing several different ways to exhibit and celebrate the history and culture of the City, such as a museum and/or interactive center on the topics of wine and boating, exhibit works of local artisans and students at Hobart and William Smith Colleges, implement previous recommendations to create a Cultural Walk .

Festivals and Events

RESEARCH UNDERTAKEN

- 1. Benchmark communities*
 - 2. GBID office records*
-

Communications

RESEARCH UNDERTAKEN

1. Benchmark communities

Festival and Events Strategies

1. Consider developing a ***“First Friday” program***, especially during the summer and fall months, in cooperation with The Smith Opera House, arts organizations, FLCC, Hobart & William Smith Colleges, Chamber of Commerce, and restaurants. The goal would be to create the “critical mass” on a regular basis to make people feel safe and want Geneva to be the “hot place to be” because the streets are filled with people. Examples include tented artisan exhibits, musical performances and outdoor dining. This was a strong preference indicated in the consumer-based market research, especially among the local residents, downtown workers, college students and residents in the 2-5 mile radius
2. Create more events and activities downtown, but are not GBID sponsored or produced such as:
 - a. Encourage area civic and cultural organizations to conduct events downtown
 - b. Work with the arts organizations to conduct activities surrounding performances, exhibits, etc.
 - c. Historic society, Chamber and schools develop one or more events that celebrate the culture and heritage of the area, and also enhance the local image of the community
3. Encourage family fun events that would be attractive to local residents, as well as, regional residents and tourists. Examples: outdoor lakefront concerts, a crazy canoe or paddle boat race, lakefront walk/run, heritage festival, Family Recipe Festival, Easter Egg Hunt, kite flying contest, dog parade and contest with some form of musical entertainment, family talent show at The Smith Opera House, volleyball or other sports events that promote health/fitness, “A Culinary Extravaganza” ... bring together chefs and wines; feature wine tastings, seminars, demo kitchens, music, etc. Regional examples: Skaneateles hosts an annual Antique and Classic Boat Show on its waterfront; Ithaca has the Green for the Future program that involves participation by residents, City of Ithaca, Regional Airport, Cornell University, Ithaca College and many local corporations
4. Seek financial sponsorships for each GBID event
5. Build a “wow” factor into each event and keep them fresh.
6. Define measure to evaluate each event such as: attendance goals, revenue to be generated, opportunities for retail sales among local businesses, etc.
7. Evaluate each event to make sure it is exclusive and exceptional enough to warrant investment of time and expense needed to produce and promote it

-
2. *GBID office records*
 3. *Consumer-based market research*
 4. *Research on Geneva's history*
-

Based on the consumer-based market research, the number one source of information is family and friends at 80%+ for both shopping and events. Information at work and newspaper articles are two important sources of information used at a rate of 50% or more by all consumer groups. Newspaper and radio advertising appear to be a primary source of information for festivals and events. Only 10% of consumers use billboards, direct mail, website, brochures and the GBID newsletter as the source of information.

The ***preferred sources of information*** include the website, radio and TV advertising, direct mail, information available at work. The City and Chamber websites are not preferred information sources.

The purpose of a communications strategy is to stimulate an increase in visitation to the Geneva Downtown District, motivate an increase in frequency of consumer activity and retail spending within the District, and “do more with less” to ensure that all elements of the overall initiative are working in harmony.

This can be achieved through repositioning, re-defining, and focusing the communications efforts on the strengths of the District that align with consumer demand to ensure that all target groups are aware of what the District offers. It is about re-connecting with the local community, and ensuring that the District is positioned within their minds as a place to gather, a place where everyday shopping is enjoyable, and a place where there is always something happening that should not be missed.

Communication Strategies

1. Do not invest in expensive brochures that quickly become out-dated. If print materials are appropriate, stick to ***rack card that are “experience” oriented.***
2. ***Develop PR strategy to target advertising and marketing dollars.*** Consider engaging student classes at the area colleges to assist in design a PR strategy.
3. ***Target radio and print advertising*** to these areas – Seneca Falls, Waterloo, Canandaigua, Geneva. Advertise on HWS radio station 105.7 FM to target the students.
4. Develop and maintain ***business recruitment collateral*** in a computer program for quick and easy assembly of customized packages
5. Develop and facilitate a ***co-op advertising program*** with the local media (radio and print) for the businesses
6. Develop and facilitate a ***cross-marketing program***, especially among the arts and dining.
7. Develop an ***e-newsletter*** that is sent out at least monthly at the initial phase, and then increased to eventually be weekly. Target major employers (including the school district), local residents and regional tourists. Work with the major employers to gain access to their internal networks it possible, or at least provide a link. And, capture e-mail addresses at events and through the merchants. Consider using Constant Contact.com
8. Continue to ***build a strong relationship with the Finger Lakes Times***, so it will be supportive of the brand launch, routinely provide feature articles, and partner in the effort to build community pride. Do not invest in fancy brochures that quickly become outdated.
9. ***Leverage the web-based marketing*** conducted by Geneva Area Chamber of Commerce, Finger Lakes Visitor Connection, and other tourism organizations and destinations. And, enter into cooperative agreements with these organizations to provide a link on their respective websites.
10. ***Leverage existing distribution channels*** to place rack cards, and to advertise new businesses, festivals, events, business promotions etc. Examples of existing distribution channels include the Finger Lakes Visitor Connection
11. ***Promote Ease and Convenience of Downtown*** in all advertising and promotional materials
12. Encourage the City of Geneva and Geneva Area Chamber of Commerce to ***improve wayfinding signage and gateways***
13. Work with the Chamber, SBDC and other organizations to provide training in ***superior customer service and good communication skills among the merchants***
14. ***Create a library of photos*** that can be used by several organizations to promote the downtown

Branding

The experience of the District should be about a sense of community where shopping is spending time with your neighbors, quality one-on-one service provided by the merchants/shop keepers, unique stores that you can find right next to where you visit and dine on a daily basis, and events that are held regularly that help enhance that experience and bring fun for the whole family.

Based on the project's objectives, insights, and desire to brand the entire Downtown District, it is recommended that sometime in the next 2-3 years the downtown district be re-defined for the following reasons:

- A brand can “re-frame” the shopping, entertainment, service and cultural offering of downtown Geneva as a singular entity, providing the launch pad for a communications program that will start to re-define the experience and offering.
- A brand can leverage the strength of the downtown (warm, friendly, human) versus a mall (big, efficient, and impersonal) by emphasizing people relationships “on both sides of the counter”.
- A brand that has a geographic base can also define the downtown neighborhood. Example: Geneva Waterfront District

A critical component to the success of the downtown's revitalization will be buy-in and adoption of a brand by all merchants and businesses within the District in advance of, and following the launch. Repositioning the district in the minds of Geneva area residents will not happen overnight, so consistency of the brand message and commitment from the merchants will be critical to its short and long-term success. Integration of the brand message by individual merchants into their signage, communications and business context will also be pivotal to maximizing the cumulative impact through frequency of messaging, redefining the context and promise in residents' minds, and ultimately bringing the community back to a vibrant, thriving shopping district that it needs to and can be.

However, much work needs to be done to position the downtown to deliver a product that can fulfill a promise to consumer groups. Therefore, the following recommendations are made with respect to the development and launch of a comprehensive branding and communications program.

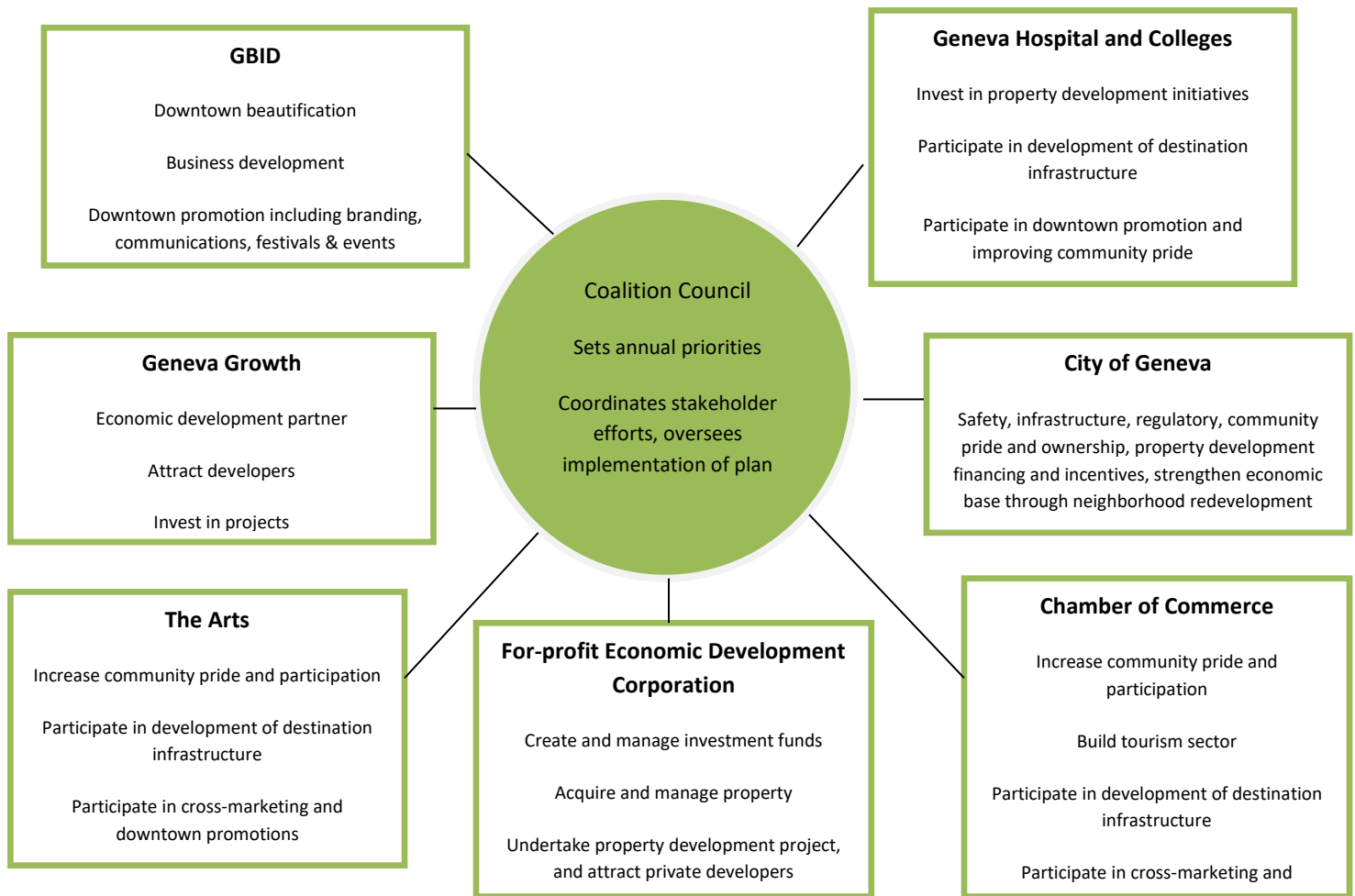
- Defer the launch of a comprehensive branding program until progress has been made in offering the consumer a rewarding and memorable experience
- Consider adding a slogan/theme such as Jewel of the Finger Lakes, Shopping, Dining and Entertainment, or The Way Life's Meant to Be

Implementing the Strategic Plan

Implementation of a strategic plan means transforming the objectives and proposed strategies into tangible results. The key to implementation of the strategies is to assign goals and responsibilities with budgets and deadlines to entities within the GBID and among the stakeholder groups, and to hold each entity accountable.

UNITY OF PURPOSE

The formation of a Coalition of stakeholders is recommended. Such a Coalition would be comprised of a private investment based economic development organization, the Geneva Area Chamber of Commerce, the GBID and the City of Geneva. Forming a coalition of these entities could involve share resources and result in efficiencies such as staffing, databases, communication and directing initiatives.



Many communities nation-wide have developed coalitions, partnerships or collaborative agreements that supersede the structure and scope of a business improvement district or downtown development authority (depending on state). The need for such a structure is based on the need for the infusion of private sector investment dollars and the need to embrace the valued participation of educational institutions and other entities such as chambers of commerce and economic development corporations.

Although they are not identical, and each has customized its structure to undertake a specific plan, they share many of the attributes of the recommended coalition for implementation of the Commercial Revitalization of Downtown Geneva. Below are some examples of such coalitions and collaborative arrangements.

Wichita, Kansas

Greater Wichita Economic Development Coalition

A broad-based coalition is led by an 11-member Steering Council comprised of two elected officials from Sedgwick County, two elected officials from the City of Wichita, a representative from the Regional Economic Area Partnership, two representatives from the Wichita Metro Chamber of Commerce and four business leaders elected from the private-sector Board of Investors.

Syracuse, New York

Central NY Regional Alliance

Partnership of representatives from private businesses, colleges and universities, not-for-profits, and leading economic development organizations throughout upstate New York to form the *Central Upstate Regional Alliance*.

New Brunswick, New Jersey (population: 50,000)

The Gateway Project

A partnership among New Brunswick, Rutgers University, and a private development corporation, for development of a mixed-use project at the cusp of the city and campus. It includes plans for a high-rise building featuring 200 condominium units, parking and retail space, and university offices. Plans call for nearby College Avenue to become a tree-lined pedestrian-friendly street designed to encourage more interaction between city residents and the university community.

Bexley, Ohio (population: 13,000)

The Bexley Gateway

City of Bexley and Capital University worked together to revitalize and expand the Main Street corridor by building housing and mixed-use facilities.

Mansfield, Connecticut (population: 20,000)

Mansfield Downtown Partnership

The Mansfield Downtown Partnership grew out of the Mansfield Downtown Action Agenda 2000, which outlined the concepts of Mansfield's downtown revitalization plan. To accomplish the goals set forth, Mansfield entered into a partnership with the University of Connecticut, local businesses and members of the community to create the Mansfield Downtown Partnership.

Bloomfield, New Jersey (Population: 47,683)

The Bloomfield Center Alliance

A partnership with Bloomfield College, New Jersey Transit, and local businesses to revitalize the township's central business district, Bloomfield Center. This alliance uses a plan to recruit new businesses into the downtown area after making the place more attractive, accessible, and well-advertised. The funding for Bloomfield Center comes from the private sector and the township.

Hamilton, NY (population: 3,500)

Collaboration between the Partnership for Community Development, Colgate College and the Hamilton Initiative (private economic development corporation) work together to continue renovations in downtown Hamilton. Colgate Trustees, headed by Tony Wailing (trustee and Class of '59), created the fund that became the Hamilton Initiative.

Dunkirk, NY (population: 13,000)

City Of Dunkirk Economic Development Coalition

A coalition of the Dunkirk Local Development Corporation, City of Dunkirk, SUNY Fredonia, Empire Zone, IDA, and the Chautauqua County Chamber of Commerce

Norman, Oklahoma (population: 102,000)

Norman Economic Development Coalition The Norman Economic Development Coalition is a joint venture of the University of Oklahoma, the City of Norman and the Norman business community through the Norman Chamber of Commerce.

It is interesting to note that the Main Street, National Trust For Historic Preservation offers 10 guidelines for the Commercial Revitalization of a Downtown. Among these ten are two that are specific to the importance of forming a coalition.

Not everyone will like you, not even everyone you must work with. You must forge coalitions that have never been formed, and many of the people involved may not be used to working with each other.

You can't do it alone. Main Street is not entirely city hall's responsibility, but independent businesses owners can't do it alone, and neither can citizen activists. A collaborative effort, combining the unique skills and vantage points of public and private sectors, is essential.

SAMPLE ROLES OF GENEVA STAKEHOLDER GROUPS

CITY OF GENEVA

- Infrastructure development including streetscape, wayfinding signage, gathering spaces, pedestrian promenades, a gateway plan, and projects to connect the downtown and lakefront areas such as the Cultural Walk, etc.
- Collaborate with the GBID and Chamber of Commerce to create a “destination infrastructure” involving museums, waterfront infrastructure and activities
- Pursue an inter-modal transportation feasibility analysis
- Parking
- Safety -- such as heighten visibility of police in the downtown area, especially after dark
- Financing and incentives for property development initiatives (485b, low-interest loans, Restore NY grant funding, consider 444a)
- Change zoning to support development of quality upper story housing
- Work with GBID to:
 - Create an environment that is “human scale”
 - Develop an annual plan for targeted property development including building rehabilitation and in-fill development
 - Identify ways to build community participation and bring recognition to Geneva
- Support GBID’s efforts to:
 - Promote a brand for the downtown
 - Promote Geneva’s culture and heritage
 - Encourage private investment in a Community Renaissance that would involve investment in building rehabilitation and urban homesteading
 - Provide a safe and clean environment (conduct an annual Safety and Walkability Audit)

GENEVA AREA CHAMBER OF COMMERCE

- Continue to package and promote destination and entertain venues that leverage community assets
- Work with the GBID and City to develop a “destination infrastructure”
- Work with GBID to identify ways to build community participation
- Support GBID’s efforts to promote a brand for the downtown

MAJOR EMPLOYERS

- Support GBID’s efforts to promote:
 - A brand for the downtown
 - Private investment in a Community Renaissance through urban homesteading and other investment initiatives
 - Geneva’s culture and heritage
 - Community participate, especially through events and festivals in the downtown

PROPOSED ECONOMIC DEVELOPMENT CORPORATION

- Take lead on business recruitment and retention, and property development
- Create and administer investment or “opportunity” funds, including funds for possible land acquisition, project start-up fund, revolving loan funds and other assistance for well qualified existing or new businesses seeking to establish or expand operations in the City.
- Acquires property
- Leases properties and manages comprehensive development projects
- Owns and manages buildings, and possibly owns business enterprises
- Collaborate with City, property owners, financing institutions and developers to develop and financing packages, and an overall property development strategy
- Work with City of Geneva , banks and major employers to develop an investment program
- Work with Chamber, City, the arts and colleges to create a “destination infrastructure”
- Initiate pre-development activities or take leadership on short-term efforts to help advance specific development goals or tackle a challenge that may be inhibiting progress in certain areas.
- Undertakes feasibility studies

HOBART AND WILLIAM SMITH COLLEGES

- Support and participate in the development of the “destination infrastructure,” particularly waterfront initiatives
- Support GBID’s efforts to:
 - Promote a brand for the downtown
 - Embrace and promote a friendly “college town feeling” and increase student/consumer foot traffic
 - Create a dynamic downtown, with the possibility of student performances, concerts, athletics activities, fun events, etc. in the downtown area or on the waterfront. And, participate in events such as “First Friday.”
 - Create private investment in a Community Renaissance through urban homesteading and other investment initiatives
- Continue to work with the arts organizations to make Geneva the “Epicenter” for the arts in the Finger Lakes

THE ARTS

- Take leadership role in making Geneva the “Epicenter of the Arts in the Finger Lakes”
- Work with GBID to identify ways to build community participation
- Support GBID’s efforts to:
 - Promote a brand for the downtown
 - Promote Geneva’s culture and heritage

MERCHANTS AND PROPERTY OWNERS

- Support GBID's efforts to:
 - Function as the "first stop" for existing, new and prospective businesses
 - Retain and grow existing businesses
 - Promote a brand for the downtown
 - Embrace and promote a friendly "college town feeling"
 - Provide a safe and customer friendly environment
 - Provide an interesting and exciting shopping experience; i.e.; interesting window merchandising
- Maintain clean and attractive storefronts and windows
- Invest in properties to preserve the historic character of the downtown and create a neighborhood through upper story housing development
- Provide high-end customer service
- Participate in co-op marketing and cross-marketing efforts

Positioning the GBID to Undertake its Role

It is recommended that the Geneva Business Improvement District play a key role as a member of the Coalition, with a focus on downtown promotion and business development. To achieve this role, it is recommended that the Board of Directors consider the following to strengthen the Board's culture and organizational structure that will provide it with the leadership necessary to create the coordination and accountability to maintain focus and oversee implementation of strategic initiatives.

Drive Key Initiatives

- Set targets for overall downtown retail mix and engage in assertive tenant recruitment efforts using collateral that demonstrates the opportunities and potential for prospective businesses based on the need and expectations of the customer groups
- Focus on the growth, retention and repositioning of existing businesses to strengthen the downtown retail core
- Serve as the “first stop” for all business support services for existing, new and prospective businesses
- Take the lead on a business promotion program (shop local campaign, sidewalk sales, etc)
- Work with the City and economic development corporation to develop a strategy for incremental “cluster development” in targeted areas that involves both tenant recruitment and property development
- Work with property owners and developers on anchor building rehabilitation, especially upper story housing development
- Be a partner with City of Geneva , economic development corporation, the banks, and the major employers to develop and launch a Community Renaissance investment program that would encourage and support urban homesteading
- Work with the City of Geneva and lending institutions to create desirable recruitment and property development financing packages
- Take the lead on overall downtown promotion – branding, advertising, promotional activities, events, etc.
- Be a partner in the Coalition to create a destination infrastructure (see Exhibit 3, page 30)
- Develop and implement a plan with other partners such as the merchants, the City of Geneva and Chamber of Commerce to embrace the college students and create a friendly “college town feeling”
- Work with the City of Geneva, major employers and civic organizations for them to assume a greater leadership role lead on producing more festivals and events downtown, especially those that would promote Geneva's culture and heritage
- Work with City to provide clean, safe and convenient environment for consumers and businesses
- Support the efforts of the arts organizations to make Geneva the “Epicenter” of the arts in the Finger Lakes through tenant recruitment

Foster an Environment for Success

- **Amend the GBID's bylaws** and use them to govern the organization on a daily basis. Make certain the bylaws accurately reflect the BID's committee structure, and that each member of the BID Board is intimately familiar with them. Also, identifying grant opportunities should be a responsibility of all committees and not just the Special Events and Promotional Activities.
- Organize the Board of Directors so it is composed of the **stakeholder leaders and people with skills important to the future of the GBID**; that is have the ability to effectively prioritize, implement and manage resources based on collective decision-making
- **Establish and maintain** strong and consistent board leadership
- **Prioritize initiatives, assign responsibility**, create funding/budget and set a **realistic timeline**
- **Assign tasks** to each standing committee. Put in writing, the scope of work, tasks, budget, deadlines, expected outcomes (see example on page 66). In some cases, you may realize that a new group (ad hoc working group, task force, or special committee) is needed to accomplish a particular initiative
- **Engage the stakeholder** groups as partners in implementation of the plan through the recommended coalition structure
- **Clearly communicate roles, responsibilities and accountability** for the GBID and all stakeholders (see examples on pages 59 – 61)
- **Communicate and motivate** ... keep the strategic plan on everyone's radar screen. Reprint highlights and progress in the newsletter and/or website. Make presentations throughout the community.
- Create an administrative structure with an experienced Director that achieves efficiencies and facilitates cooperation among all groups with the **unified goal to develop a dynamic downtown**
- Maintain a visible presence in terms of office location and proactively interact with the business community on a daily basis
- **Identify issues and seek solutions** by proactively engaging the businesses and property owners
- Work to **eliminate duplication of effort and inefficient use of resources** by getting a clear definition of roles, relationships and commitments of stakeholder organizations

Inclusion and Participation

- **Inclusion** – Maintain an organizational structure that allows for GBID businesses and property owners to be included
- **Participation** - Facilitate input of all stakeholders in on-going strategic planning, decision-making and evaluation
- Sponsor **information sharing** opportunities

Cooperation and Collaboration

- **Coordination**– Function as the vehicle for **coordination, cooperation & building consensus** among businesses, property owners, organizations and government agencies
- **Collaboration** – Engage in collaborative efforts with key organizations to design and implement strategies that **capitalize on their respective strengths**; especially the City of Geneva, the Geneva Area Chamber of Commerce, Geneva Growth, Hobart and William Smith Colleges, and the arts community

Geneva Full Occupancy Initiative

Susan M Payne, Community & Economic Development Consultant | Page 65

Communication and Advocacy

- Function as the **“first stop” for information** for new businesses
- Facilitate access to **business support** services for new and existing businesses
- Practice **open, honest and routine communication** with all stakeholders
- **Advocate** for the collective needs of businesses and property owners

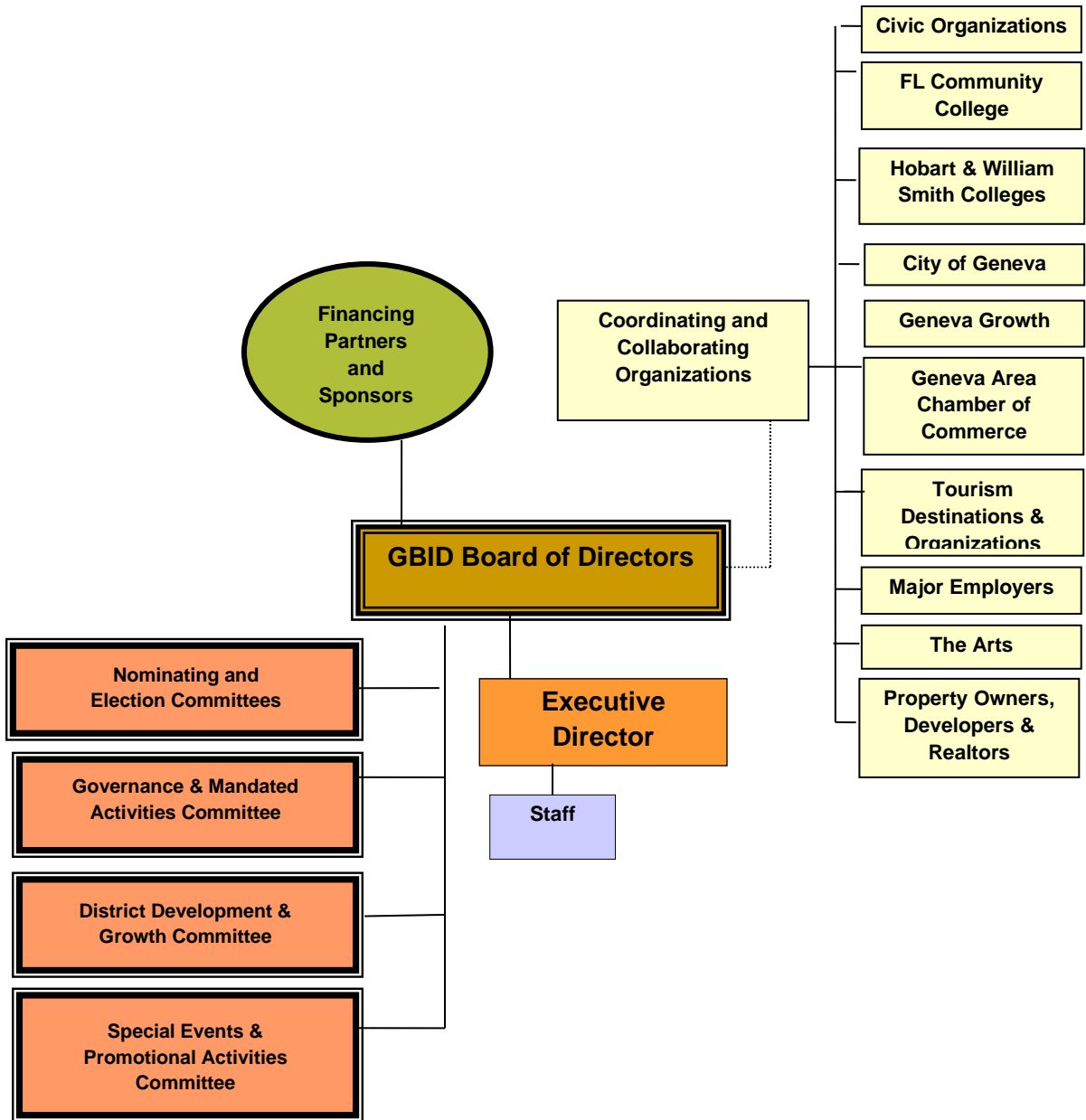
Manage Resources

- **Identify and manage** financial resources
- Develop and implement effective ways to **coordinate decision-making** and **allocation of resources for the greatest return on investment**
- **Collaborate** with individual businesses, The Smith Opera House, Geneva Area Chamber of Commerce, and museums and tourism organizations to **leverage and maximize resources** for advertising and promotional activities

Monitor, Measure and Report

- Establish **measurable goals**
- Establish **benchmarks, measurement standards, controls and techniques**
- **Evaluate performance, effectiveness and efficiency** of the organization
- **Openly report on success** toward achieving measurable goals in terms of **quantitative and qualitative results**.

Sample Organizational Structure



Sample Charge to the District Development and Growth Committee

Budget for FY _____ : \$ _____

Scope of Work and Tasks for FY _____

- **Business Mix and Merchandising:** Recommend ways to increase the District's competitive edge through business mix and merchandising strategies geared to meet needs and expectations of the consumer. Oversee the business recruitment and retention efforts of the staff
- **Business Retention:** Recommend tools to increase business retention and strengthen existing businesses (financial incentives, education, support services, market research information, etc.)
- **Expansion and Repositioning:** Identify ways to help reposition and expand existing businesses to make them more attractive to consumers and competitive with other markets (product line, brand mix and merchandising strategies; enhancing customer experience; expanded business hours; etc.)
- **Private Investment:** Identify ways to leverage resources and stimulate private investment in anchor property projects; i.e., façade enhancement, property revitalization, historic preservation, building signage, and other business renovation efforts, and development of second stories and vacant properties
- **Business Development:** Monitor retail mix, identify gaps and suggest new market opportunities
- **Development Standards:** Work with City of Geneva for the development of standards for facade and other property improvements

Performance Measures: The Committee will provide a quarterly report to the Board on the following measures:

- Retention of existing businesses
- New business development in target business categories
- Increased sales tax revenue
- Enhancement of the visual appearance and overall ambiance of the District (façade improvement, etc.)
- Enhanced economic base (increased property value, reduced vacancy rates, increase in # of building permits)

Expected Outcomes:

- Reduce vacancy rate from 28% to 20%
- Make progress in achieving the target business mix through recruitment and repositioning of existing businesses
- Rehabilitation of at least one targeted anchor building is underway
- Increased profitability of businesses

Overall Observations

Tree planting and other streetscape efforts, together with building renovation and façade improvements, are only “cosmetic” physical improvements and will not address the storefront vacancy problem.

Geneva’s struggling downtown is suffering from several problems such as undercapitalized small business, no strategic business mix strategy, and lack of community pride and a sense of ownership. In fact, some focus group members referred to downtown as “Bars, Banks and ... “

As John Gann, a downtown revitalization consultant says “Downtown didn’t decline because it was not nice-looking. It stopped being nice- looking because it declined.”

1. The elements of a vibrant and successful downtown consist of both tangible and intangible things.
2. The sense of pride and ownership by the local and surrounding regional residents is at the heart of a downtown’s success. Without community pride and ownership, the heart beat of the downtown will continue to languish
3. Topnotch schools, good jobs, quality affordable housing, low crime, an active cultural life, vibrant downtown, and venues for outdoor activities that cater to families are the top criteria for the most desirable small towns in the country
4. Geneva has made great strides in improving its physical presence sidewalks, crosswalks, lighting, cleanliness, building rehabilitations, and façade improvements. In this respect, Geneva would be the envy of many communities. But this is only the physical piece. It’s not the container, it’s the contents that count.
5. A vibrant downtown is not a set of rehabilitated buildings and series of lamp posts
6. The struggling downtown is suffering from several problems such as undercapitalized small business, no strategic business mix strategy, lack of community pride and a sense of ownership
7. Vacant storefronts are only one symptom of the multiple issues facing the downtown. They are only the external indicators of a failing downtown.
8. Although they play an important role in making the downtown physically attractive, tree planting and other streetscape efforts, together with building renovation and façade improvements alone, are only “cosmetic” physical improvements and will not address the storefront vacancy problem
9. Geneva is missing a ***Heartbeat***
10. Geneva has a ***Vitamin C Deficiency***

HEARTBEAT AND VITAMIN C DEFICIENCY

- **Consensus ... Unity of Purpose.** The key to Ithaca's success is **collaboration**. "This small town in upstate NY is a thriving engine of high-tech business and intellectual capital where a spirit of cooperation prevails."
- **Creative thinking** about the best ways to leverage community assets
- **Community pride**
- **Center city ... gathering places** and small town feeling
- **Character and charm** revealed in the community's history and artistic wealth
- **Celebration** of the community's culture and history
- **College town feeling** that truly reflects an integration of the academic community with the overall Geneva experience
- **Connection between the mind, spirit and body** that makes Geneva unique on Seneca Lake and can be achieved through joint initiatives with the colleges, healthcare, City, community leaders and organizations
- **Clustering** of retail goods & services
- **Catering** to the needs and expectations of the consumer
- **Community leaders**, from both the public and private sectors, need to "drive" the implementation of strategic initiatives that have clearly definable and measurable outcomes
- **Critical mass** on a daily basis ... quality housing, gathering places, select retail and services, interactive activities, and interesting things to do
- **Culinary offerings** that are destinations because they are fun and interesting, and leverage the wine industry and the community's ethnic mix