Cazenovia Development Study

Sponsored by:
Cazenovia Area Community Development Association
Greater Cazenovia Area Chamber of Commerce
Syracuse University Whitman Consulting Group

The Whitman Consulting Club of Syracuse University, in conjunction with the Cazenovia Area Community Development Association and the Greater Cazenovia Area Chamber of Commerce, has conducted a market research study of the business activities of residents of Cazenovia. The study assessed business usage and general resident perceptions of the business district, defined as Albany Street and the area through the Plaza. Attention was focused on the demographic profile of Cazenovia residents as represented by respondents. The survey also captured resident opinions regarding proposed commercial expansion projects as well as thoughts on future residential expansion.

Adapting a similar survey completed in 1996 by the Orange Consulting Group of Syracuse University, the Whitman Consulting Club has explored the changes within the Cazenovia Business District over the last ten years. Demographic shifts in the population and the major areas of change were the focus of comparison between the two surveys. The findings presented in this report are a composite of the surveys received from the residents and are designed as informational tools for community business leaders.

Over 4,100 households in the Greater Cazenovia area received the questionnaire through the mail. The mailing included a letter explaining the purpose of the research. The respondent was also able to submit the survey on-line through a specific website containing the questionnaire. A total of 623 questionnaires from these households were completed and returned, representing a response rate of approximately 15 percent. For a survey of this type, the expected response rate is found between three and seven percent indicating that current response rate is rather high. The response rate in the 1996 survey was approximately 31 percent. Several factors could have influenced the lower response in the current survey including the timing of the survey (mailing occurred in close proximity to the Thanksgiving holiday), the technical nature of modern society or a lack of interest by residents.

The questionnaire designed in 1996 by the Orange Consulting Group was modified and updated for the current survey. Several potential responses and questions were considered outdated and were thus deleted. Other services representing general life in 2006 (i.e. internet usage) were added to the survey. Original survey response options were also expanded to offer a better picture of resident’s perceptions. Questions related to potential current expansion and developments were also added. As mentioned previously, the survey was available to residents in paper form through the mail or on-line through a website survey form.

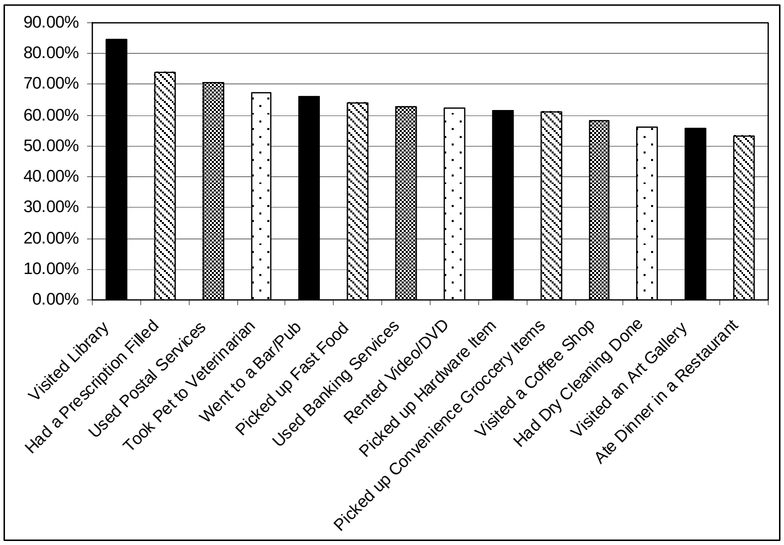
Several items should be noted in regards to the current survey. Unlike the 1996 survey, Cazenovia College students were not included in the study. Results represented in this report are based on empirical, percentage responses to the closed questions on the survey. Additional comments written by residents are included to provide further insight into responses. These additional comments should be used to further understand the nature of the opinions, not necessarily the level of a given opinion.

A. Business District Usage

The Cazenovia Business District is a powerful asset to the town. Over 91 percent of respondents visiting the business district at least one time per week. Respondents also conduct some kind of business while in the business district, indicating a strong support of local commerce. This resident presence can be leveraged to develop and grow businesses that residents want and / or need.

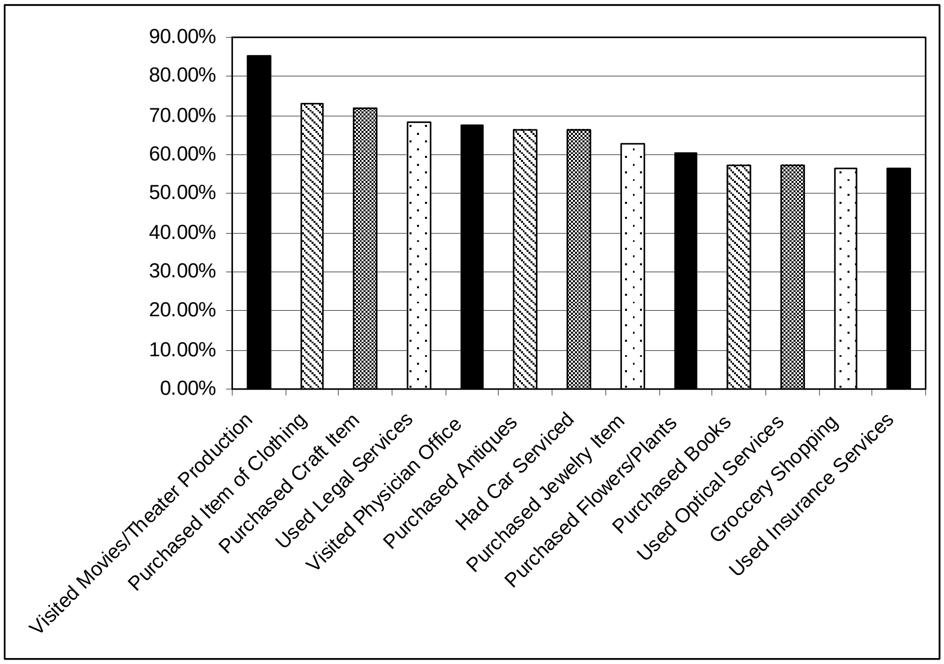
Several services are used almost exclusively inside of Cazenovia: 71 percent of respondents who use the post office used the Cazenovia Post Office: 74 percent of respondents who get a prescription filled do so inside Cazenovia. Similarly, a high percentage of respondents visit the Cazenovia Library. High usage percentages indicate strong services that the residents have trusted the Cazenovia district to provide for them. Several other services are used by respondents more often inside of the business district including picking up fast food, picking up convenience grocery items, rental of a video and/or DVD, visiting a bar/pub, taking a pet to a veterinarian and doing their banking. **Exhibit 1a** shows the distribution of these services. As seen, basic services are integral parts of resident’s trips to the business district.

Exhibit 1a: Distribution of Services Used Inside Cazenovia
Percentages based on number of respondents who participated in the activity.



While there are several services used almost exclusively inside of the Cazenovia business district, there are also many that respondents who frequent the service prefer to do so in other areas. These services could provide potential opportunities for growth and development in the business district in the future. As seen in **Exhibit 1b**, clothing purchases made were done so outside of the business district by 73 percent of respondents who purchased clothing at all, while 71 percent of respondents who bought a craft item did so at a location other than Cazenovia. Of the respondents who indicated that they had been to a movie in the past month, 85 percent did so at a location outside of the Cazenovia Business District. Other services used more frequently outside of the business district include having a car serviced, using legal services, purchasing of antiques, and visiting a physician of any kind. It is important to note that these activities that are done by residents in the past month and do not necessarily reflect that services available in Cazenovia are not being used at all.

Exhibit 1b: Distribution of Services Used Outside Cazenovia
Percentages based on number of respondents who participated in the activity.



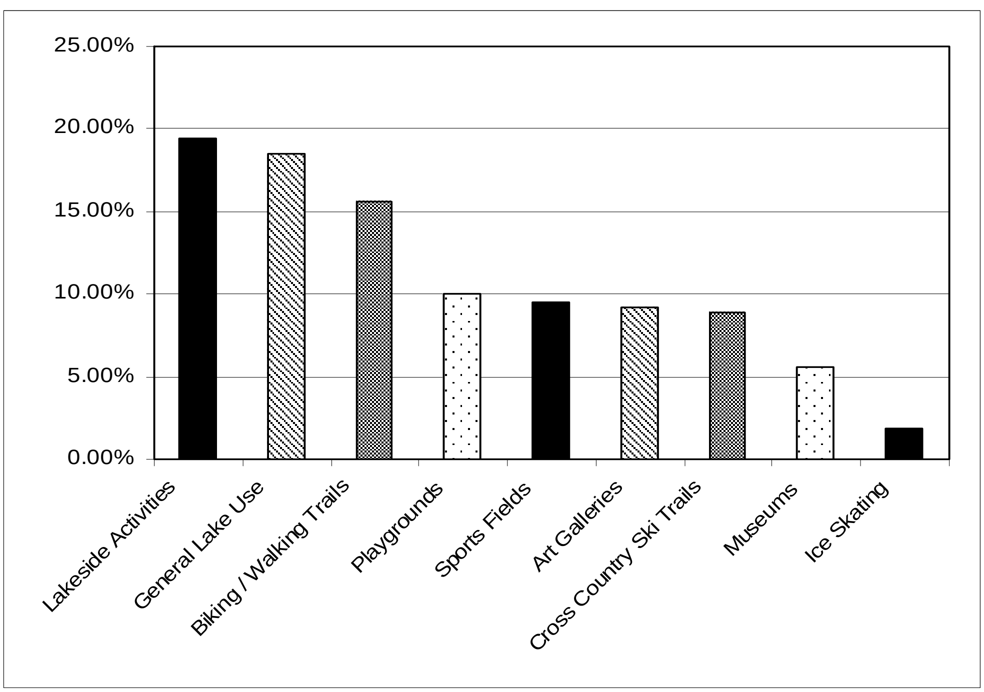
In addition to services used exclusively inside or outside of Cazenovia, there were a number of services that were not used by a majority of respondents in the past month. Based on all responses, 86 percent of respondents did not purchase antiques, 86 percent did not use any spa services and 77 percent did not use the services of a travel agent. Other services that were not used by a majority of respondents include legal services, visiting an art gallery and using a fitness center or gym. While some of these services were not used by respondents, other services shifted their distribution channel online. Services with increased usage online include 50 percent of respondents who use a travel agent, 24 percent of respondents who purchase books and 22 percent of respondents who rent a video / DVD. These shifts tend to follow the trend seen in society in general with the rise of services like NetFlix and Amazon.com. Use of online services is only expected to increase in the coming years.

Overall, the business district is a strong asset for the Town of Cazenovia and its residents. Residents were also asked to identify whether they would prefer to partake in a service outside or inside of the Cazenovia Business District. Results showed that for respondents giving an answer, every service received over 50 percent preferences for inside. These results indicate that residents are willing and ready to support local commerce if what they are looking for is available to them. As one respondent commented, “My preference would be to support local businesses which I do whenever I can… The convenience to make purchases/services from local merchants does not meet my needs.” Another resident commented, “I have lived here for 38 years and more than anything would love to stay in Cazenovia to do my shopping.”

B. Recreation and Natural Resources

Cazenovia has an important advantage that many other small towns in America do not have: Cazenovia Lake. The lake provides an excellent source of recreation and family entertainment either through water sports or through lakeside activities. Residents identify this resource and use the lake as a basis for their recreation in some cases as shown in **Exhibit 2**. Of all respondents, 19 percent indicated they enjoyed lakeside activities while 18 percent of respondents used the lake for various purposes. Other recreational opportunities also exist around town and are used by a fairly high amount of respondents. Families, especially, are extremely active in Cazenovia and responses indicate that as the number of family members increase, as does the number of recreational activities they partake in. Use of sports fields, playgrounds, skate parks, ice skating and the biking/walking trails increase with the number of family members.

Exhibit 2: Recreational Area Usage



Use of many activities is correlated with the age of the respondents as well as the age of any family members. Younger respondents (age group 26-40 years) tended to use playgrounds as a recreation activity and less of the museums or art galleries. The oldest age group (age 55 and over) identified the cross country ski trails, art galleries and museums as main recreational areas. Across all three age groups, general lake use, lakeside activities and biking/walking trails were the three highest recreational activities that respondents used.

In an increasingly active and health-conscious society, Cazenovia is poised to give its residents excellent recreational opportunities. Residents are interested in the resources that are available and use many of the activities that are already available. Several respondents were also interested in snowmobile trails, equestrian trails, increased parks and playgrounds (including indoor play areas), a public swimming area, and in a greater number of sports fields, namely softball fields. Many residents are drawn to Cazenovia due to the nature and the recreational possibilities, "I live in Cazenovia because I love its rural nature, walking trails, dark nights, lack of 'big boxes' and excessive stores." As younger generations start families and bring their children to Cazenovia, they are looking for more recreation and a greater number of activities available for families to enjoy together.

C. Growth Opportunities

The results explained in the previous section offer several business opportunities for the district. Question four of the survey provides additional insight into the kinds of services that respondents are looking for and would or would not use on a regular basis. Again it is important to remember that the results that follow are based on the empirical, percentage responses received from residents. They should be used as a guide, not as an absolute predictor of business success.

Respondents were given several service options and asked to rank their level of use of the business as weekly usage, monthly usage, usage every six months, once a year visits or will not use the service at all. Respondents indicated several services that would be used at least monthly, with two services that would be used on a weekly basis. For example, 41 percent of respondents would frequent a farmer's market at least once per week and 33 percent would also use a bakery at the same frequency. Respondents (34 percent) also indicated that they would use a drive thru

ATM at least once per week; however 34 percent also indicated that they would not use this service at all.

Several services would also be used on a monthly basis by respondents. An indoor/outdoor café would be used by 40 percent of respondents and 39 percent would also frequent a moderately priced department store. A high number of respondents (39 percent) also indicated that they would visit more ethnic restaurants if they were available. When asked what ethnic foods they would like to see, respondents listed Mexican, Thai, Italian, Greek and Chinese/Japanese as their top choices. Other services that respondents indicated they would use on a monthly basis include a dessert and coffee house, a gourmet food store, a health food store, a movie theater and a discount department store.

Respondents also indicated services that they would visit less frequently, either on a bi-annual or yearly basis. For example, 37 percent of respondents indicated that they would use a shoe store and 33 percent would visit a women's clothing store on a bi-annual basis. 27 percent of respondents would also use both a sporting goods store and an office supplies store ever six months. Respondents indicated that the only service they would use on a yearly basis would be a shoe repair store, with 34 percent of respondents indicating this choice.

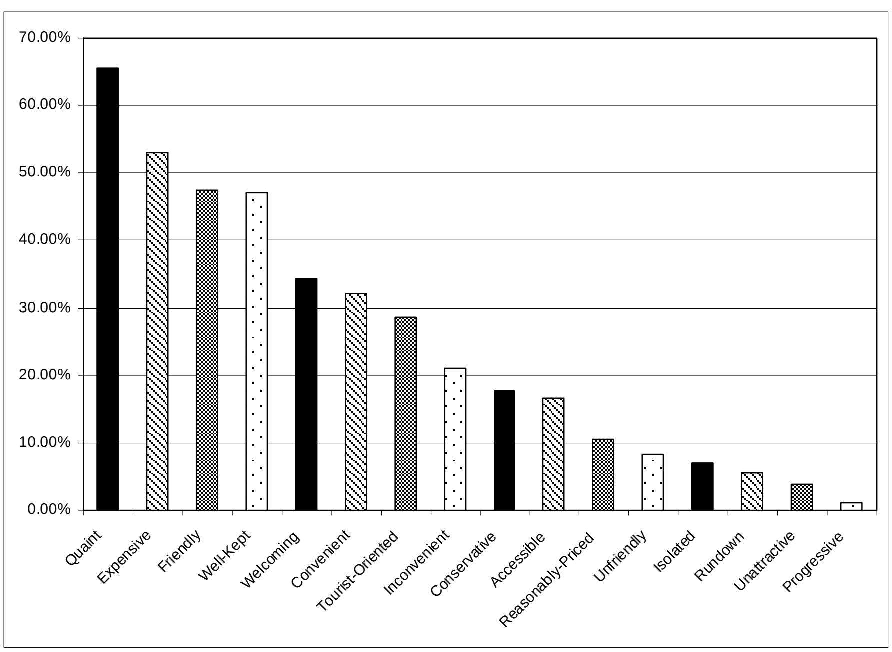
While several services produced the majority of responses in the "not at all" category, these results do not represent the opinion of all respondents. Most of the "not at all" services received their designations by less that 50 percent of the respondents. The only notable exceptions to this are the 59 percent of respondents indicating they would not use a youth center and the 54 percent of respondents who would not use boat rentals. These results may be attributed to the demographics of the respondents, as a high percentage (36 percent) of respondents is over the age of 55. Respondents also were given the opportunity to list additional services that they would like to see in the business district. These services/businesses include a larger, updated grocery store, a dollar store, a health food store (Trader Joe's was listed very frequently), a home goods store, a Barnes & Noble/Border's-like book stores, and a Dunkin Donuts-like coffee shop. Wal-Mart was also indicated as a desired store by several respondents. It is worth noting that the presence of "big box" stores is desired by some respondents, yet opposed by others.

Comments left by respondents also give some insight into the possible business opportunities that may exist. One respondent states "Caz needs somewhere for adults to hang out besides a bar. [It] Needs a bookstore or magazine shop with coffee/espresso. Everything in that town is geared toward families or children. Very nice but don't forget the adults." Another respondent wrote, "We have enough banks and drugstores. Would love a good bakery, grocery store and gourmet food shop. Another good clothes store would be good also."

D. Perceptions of the Business District

Another key asset includes the perceptions of Cazenovia. Respondents were asked to pick four adjectives out of sixteen possible they felt best described the Cazenovia Business District. Respondents generally choose positive words to describe their town and the overall image of Cazenovia to its residents is extremely strong. Quaint, friendly, well-kept and expensive were the four adjectives used to describe the business district most often. With 64 percent of respondents choosing quaint, this adjective reflects the rural nature of the town and the close knit community that comprises it. With 52 percent of the respondents indicating expensive, this may help to explain the business district usage patterns described above. **Exhibit 3** illustrates the adjectives used by residents to describe Cazenovia. Many respondents commented on their positive views of the town and feel proud to be residents of Cazenovia. "We have a treasure here where in most situations less is more." The solid support of the residents is essential to successful growth and development initiatives.

Exhibit 3: Resident Perceptions of Cazenovia



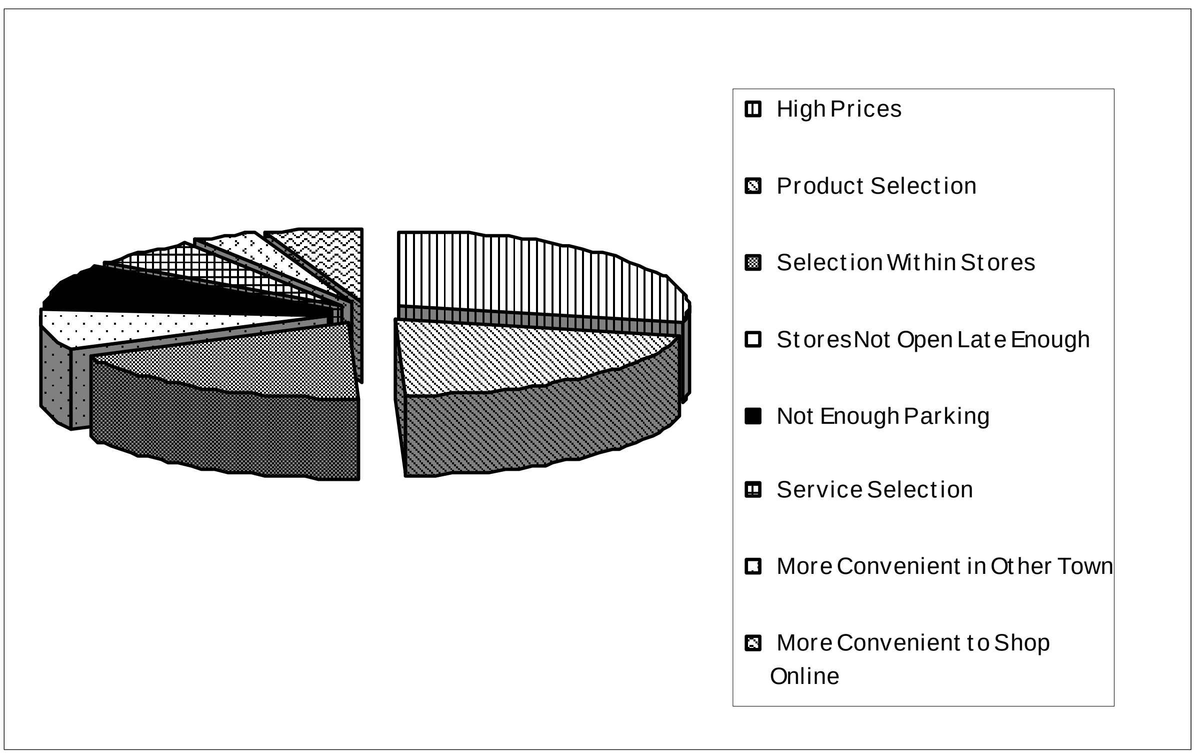
Question seven of the survey asked respondents to indicate their agreement or disagreement with several statements regarding the Cazenovia Business District. These statements reflect several important aspects that would affect business district usage and also reflect perceptions of the Cazenovia Business District. Respondents indicated a strong positive image of the business district through their responses and also some target areas for improvement. Forty one percent of respondents strongly agreed that the business district is on their way from home / school, and 49 percent strongly agreed that they felt safe walking around the business district at night.

Respondents were in agreement with several of the statements listed in question seven. These statements were given an agree vote by a majority of the respondents who answered the question. These are positive views of the businesses and of the business district by respondents. Respondents agreed that stores were clean and well-kept, that the stores are open late enough and that the service people in the stores make them feel welcome. Delivery service and convenient parking are also sufficient to suit respondent's needs. Respondents also agreed that it is more convenient for them to conduct their shopping either online or in another town. However, there are a few negative statements that respondents also agreed with. Several respondents (38 percent) agreed that high prices kept them away from stores they would otherwise patronize. Comments received from respondents provide additional insight into these results, "We just don't have a lot of discretionary fund[s] to spend on clothing, eating out and recreation. We love the area, but New York living is expensive." "Prices are too high… We need a place to buy clothing at a fair price and [a] grocery store [that] provides fresh foods." "I would love to be able to go home from work, relax, change, eat and then be able to do shopping or spa-like services in evening 6-9pm- Right now I have to do all my errands on the way home." In contrast though, several residents offer these comments, "National chains are elsewhere which is, in reality, a good thing." "I like selection in large department stores but do not want that type of store in Caz. I go to the mall for that!"

In terms of access, 63 percent of respondents indicated that they see snow removal as adequate indicating that snow fall does not preclude them from conducting business in the business district. However, respondents indicated that in-store selection is inadequate, that the parking is inadequate and that Cazenovia offers neither the kinds of services nor the kinds of products needed. These areas indicate possible target areas for improvement to improve business district usage and respondents' perceptions of the area.

Respondents were also asked to identify the two most important reasons why they do shopping, errands and entertainment outside of Cazenovia. Many respondents were fairly split on their reasons; however two main reasons did appear in the results: 28 percent of respondents listed that the products they needed were not offered in the Cazenovia Business District, while 21 percent of respondents felt that the inadequate selection in stores was a main reason to do business elsewhere. Another strong reason listed was high prices, with around 18 percent of respondents listing this as a reason to shop outside. **Exhibit 4** illustrates the full breakdown of results for this question. These results can offer insights on how to improve businesses within the business district to bring customers back into town. One respondent also stated, "Prices are too high in Caz. Can't buy simple things in town like socks. Need a store like Wal-Mart. Restaurants, hotels, drugstores are great." Another wrote, "Don't have stores for 'work people' like Wal-Mart/PriceChopper/Pizza Hut/Doug Fish Fry."

Exhibit 4: Cazenovia Areas for Improvement



E. Development and Expansion Projects

A main reason for the pursuance of the resident survey was to gain insight into proposed expansion projects within the business district and the town itself. Resident opinions regarding projects are extremely important to consider. Respondents were asked to give their opinions regarding both the commercial expansion of the business district and of proposed residential development around Cazenovia. For each proposed commercial expansion project respondents were asked to rate their use of the new service, followed by their opinion on the amount of like businesses already available and to determine the overall importance of the addition of the service to the business district. For residential expansion, respondents were asked if they viewed the expansion as positive or negative, if they felt expansion was necessary and to assess the impact they feel the expansion will have on the business district.

The commercial expansion projects respondents were asked to discuss were of a grocery store, a convenience/drug store, a bank, a hotel/motel, small office space, and information and/or space for weddings/receptions. These projects can be important additions to the business district if the resident support is behind them. As seen in **Exhibit 5a**, the most often used service would be a grocery store with 77 percent of respondents responding that they would use one often. 35 percent of respondents would also use a convenience/drug store often as well. A greater percentage of respondents would either not use at all or were not interested in the other services In general, **Exhibit 5b** shows respondents felt that convenience/drug stores, banks, hotel/motels and space for weddings/receptions are already present in high numbers in the business district. **Exhibit 5c** indicates that a grocery store would be an important addition to the business district. Respondents were split fifty-fifty on whether small office space was important or not.

It is worth noting that for these set of questions, a majority of respondents stated they would not frequently use a hotel/motel, office space, or wedding/receptions. In addition, more than 50% stated that there are too many hotel/motel and wedding/reception businesses in the business district. Yet, approximately 50% stated that hotel/motel, office space and wedding/receptions would be important additions to the business district. Interpreting Exhibits 5a, 5b and 5c together, it would appear that hotel/motel, office space, and wedding/receptions do not represent the greatest needs of Cazenovia residents that responded to the survey.

Exhibit 5a: Frequency of Expansion Project Use

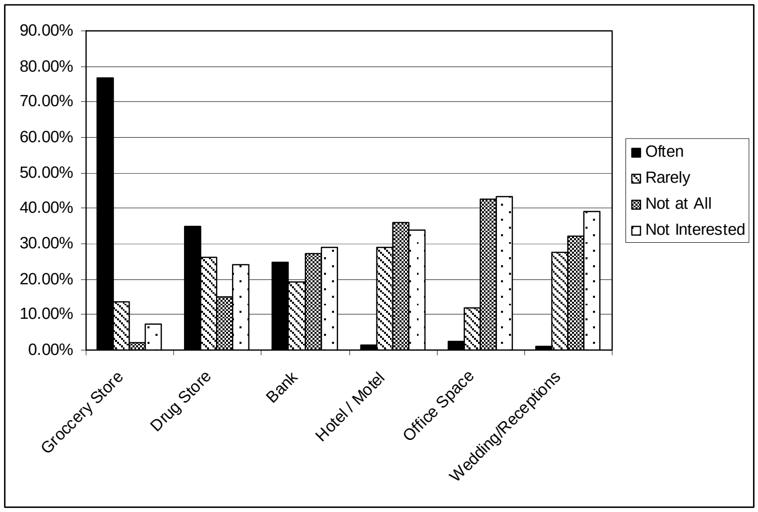


Exhibit 5b: Too Many Like Businesses in the Business District?

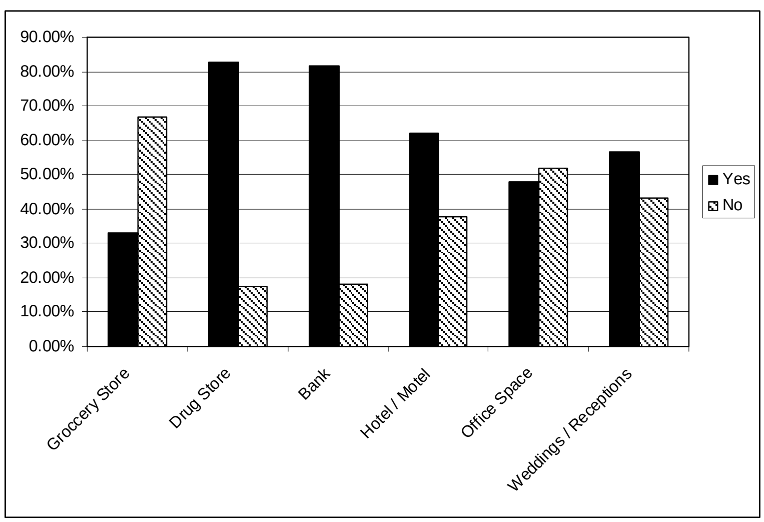
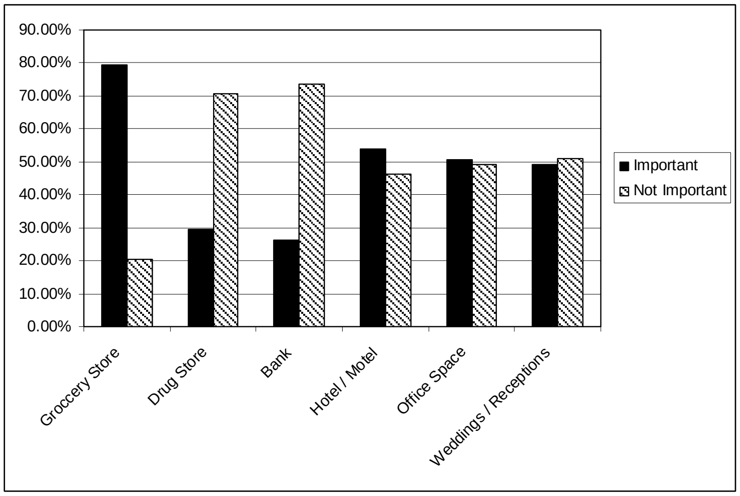


Exhibit 5c: Projects as Important Additions to Business District



When looking at the results, several differences in opinions appear when the responses are broken down by age group. In the 26-40 age group, over 70 percent of respondents indicated that they would use a grocery store often. On the other hand, 58 percent would not use a convenience store/drug store, 70 percent would not use a hotel/motel, 85 percent would not use small office space, 56 percent would not use a bank, and 67 percent would not use wedding/reception space. Please see **Exhibit 6a** for a full break down of the 26-40 age group results. **Exhibit 6b** illustrates the opinions regarding like-businesses in the district and **Exhibit 6c** lists the results for how respondents view the importance of the project to the business district.

Exhibit 6a: Frequency of Expansion Project Use (26-40 Age Group)

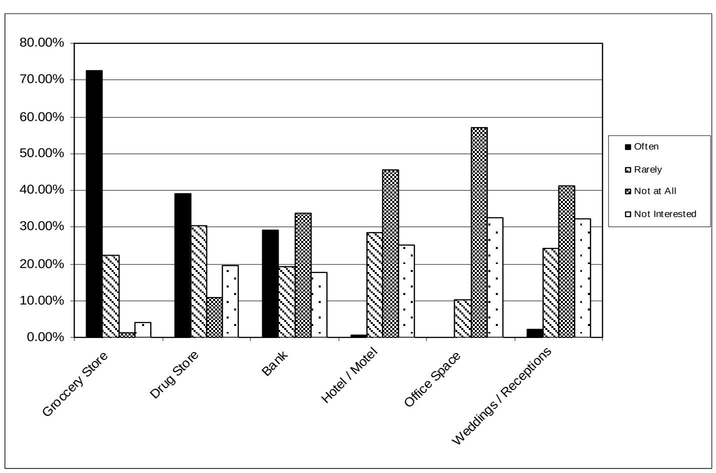


Exhibit 6b: Too Many Like Businesses in the Business District? (26-40 Age Group)

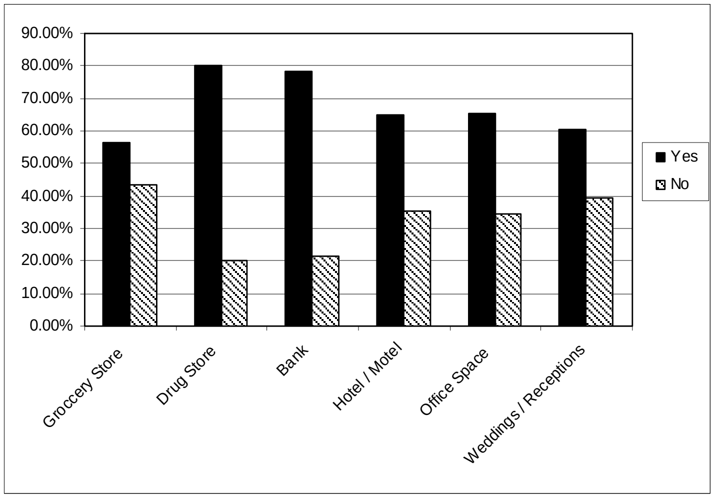
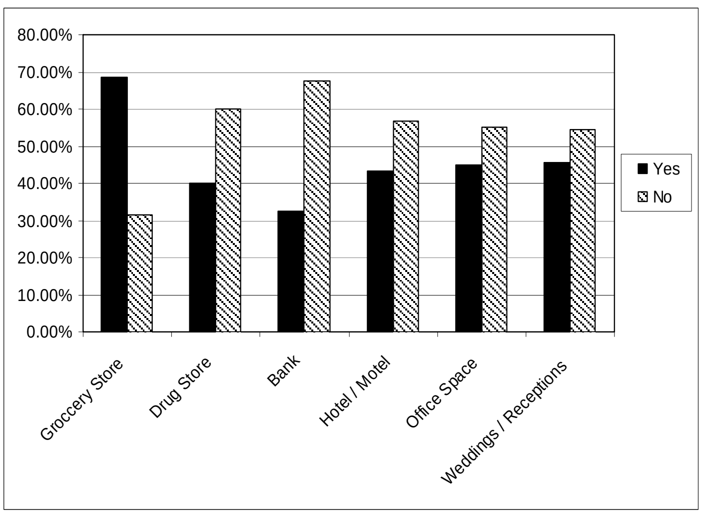


Exhibit 6c: Projects as Important Additions to Business District (26-40 Age Group)



In the 41 to 55 age group, similar results are seen to those obtained by the 26-40 age respondents. As seen in **Exhibit 7a**, almost 80 percent of respondents would use a grocery store often, but 83 percent would not use small office space. Respondents also indicated that they would not use a convenience/drug store, a bank, a hotel/motel or wedding/reception space as seen in the younger age bracket. **Exhibit 7b** shows that this age group also views many of the services already present in the business district. Unlike the younger group, respondents did feel that small office space did not already have too much of a presence. The opinion on wedding/reception space is also much closer in this age bracket than seen in the 26-40 year olds.

Exhibit 7c indicates that the 41-55 age group views more projects as important additions than the previous group of respondents. A grocery store is definitely viewed as an important addition to the business district, while opinions regarding a hotel/motel and small office space are mixed.

Exhibit 7a: Frequency of Expansion Project Use (41-55 Age Group)

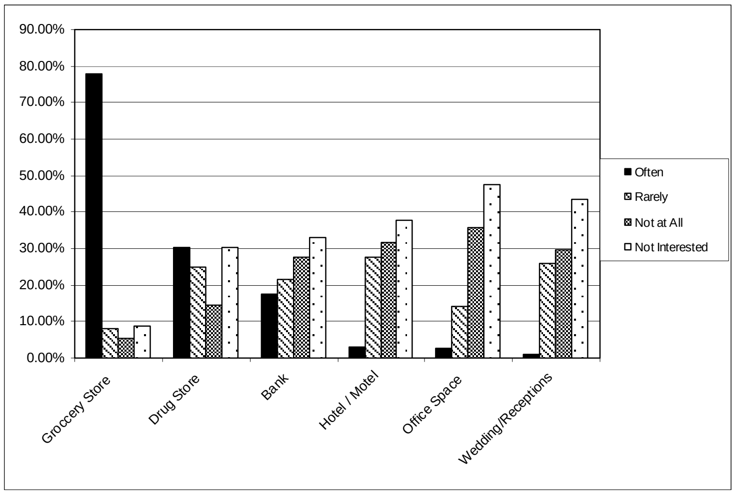


Exhibit 7b: Too Many Like Businesses in the Business District? (41-55 Age Group)

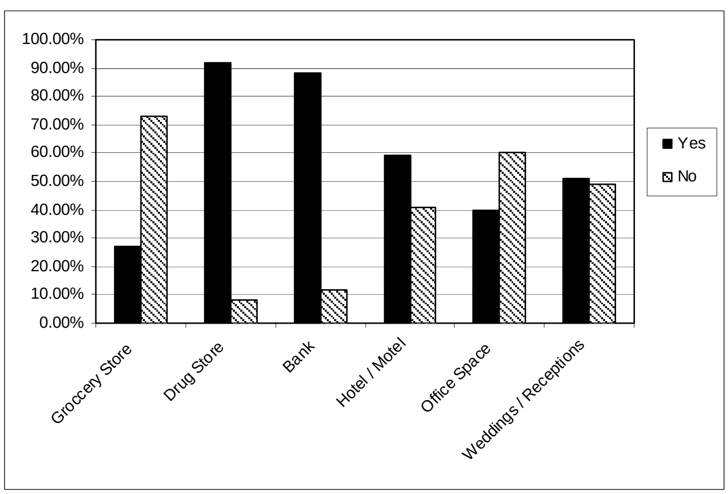
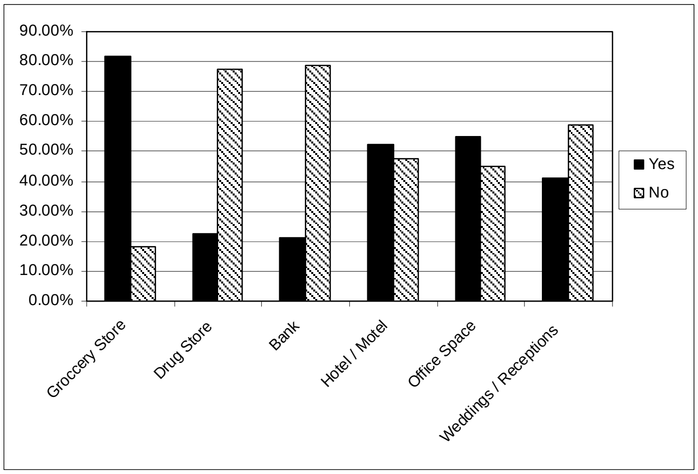


Exhibit 7c: Projects as Important Additions to Business District (41-55 Age Group)



The last age group of respondents, the 55 and older group, gives similar results to those seen previously. Over 70 percent of these respondents would use a grocery store often. Ninety percent stated they would not use small office space and 71 percent would not use a hotel/motel. **Exhibit 8a** shows the full results for this age group. When asked if they felt if there were already too many like businesses in the district, respondents also felt that convenience/drug stores, banks, hotels/motels and wedding/reception space were already too numerous. **Exhibit 8b** shows the break down of opinions on like businesses. **Exhibit 8c** illustrates respondent's views on the importance of projects. Similar to above, interpreting Exhibits 8a-8c, it would appear that a grocery store represents the greatest need of respondents. Other alternatives, while viewed as potentially important additions, may not be used by this group or already exist in the district.

Exhibit 8a: Frequency of Expansion Project Use (Over 55 Age Group)

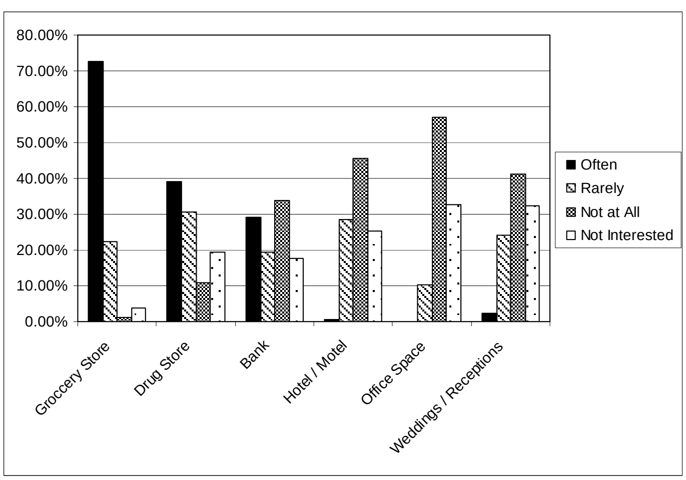


Exhibit 8b: Too Many Like Businesses in the Business District? (Over 55 Age Group)

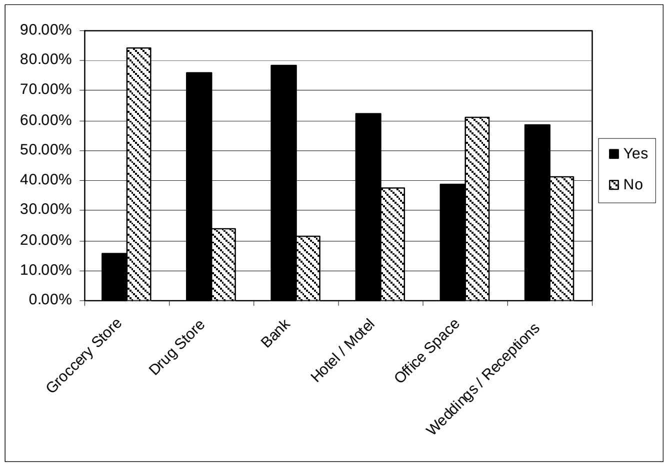
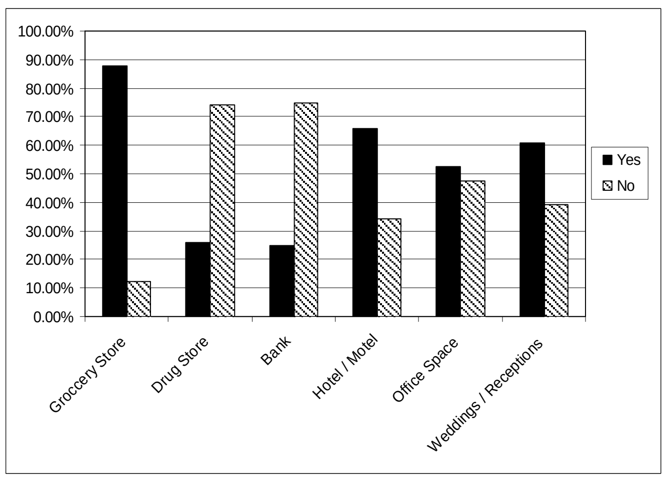


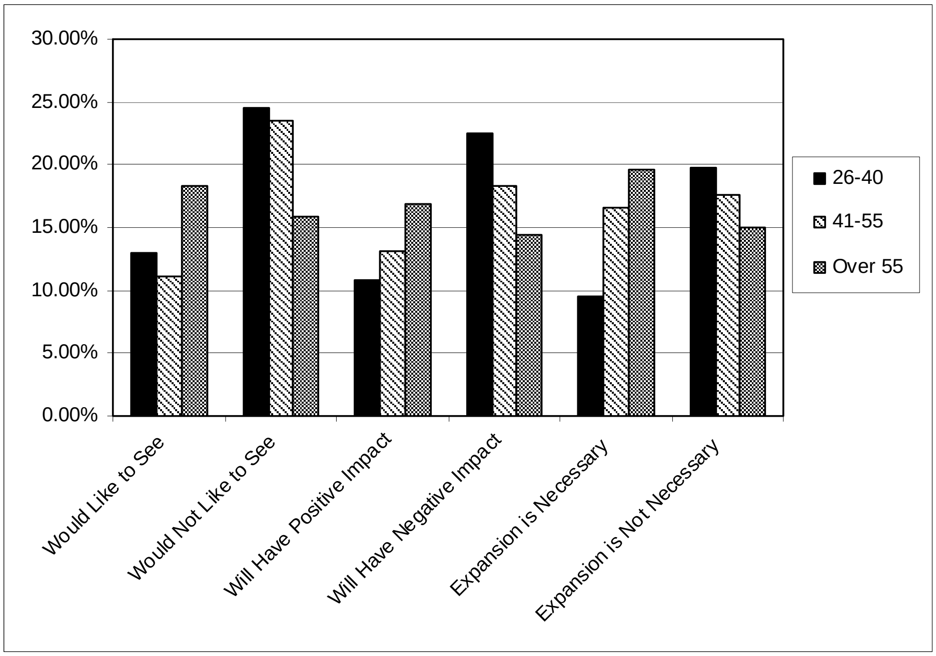
Exhibit 8c: Projects as Important Additions to Business District (Over 55 Age Group)



Residents were asked (question ten) of their opinions on residential expansion within the village. Six different opinions were asked by the survey in order to assess differing views of the projects. Respondents could select more than one opinion in their responses. Most of the respondents selected at least three of the opinions with a total of 57 percent of respondents indicating a negative response of either “Do not want to see residential expansion”, “Will have a negative impact on village area” or “Expansion/Development is not necessary.” The remaining 43 percent of respondents indicated that they had positive views of the proposed residential projects. When the results are matched to the age groups indicated above, a more interesting picture is received of opinions on residential expansion (see **Exhibit 9**). In the age group of 26 to 40, a total of 67 percent of respondents indicated a negative view to resident expansion. For 41 to

55 year old group a total of 59 percent of respondents held a negative view of the projects. In contrast to the other two age groups, the 55 and older age group only observed a total of 45 percent of respondents with a negative view of the project.

Exhibit 9: Residential Expansion



We also examined the results to see if there was a relationship between household income and respondent opinion of the residential development plans. While many of the income ranges reflected the patterns seen in the total responses, one range favored a positive view of the residential plans. Respondents indicating that they had a household income of $125,000 to $149,999 overwhelmingly shared a positive view of the expansion projects with around 71 percent positive response. Many of the other ranges indicated a split of opinions that were very close to evenly split. In general, no direct relationship was seen between residential expansion plans and respondent household income.

The results show that a majority of the respondents view residential expansion projects in a negative manner. The surveys also included numerous comments regarding the expansion and development plans. While 57 percent of respondents did not feel that residential expansion is a positive addition, many also indicated that expansion projects would be acceptable if done in a controlled, limited and affordable manner. Others also commented in regards the impact of proposed expansion projects on the existing infrastructure of the village area. As one respondent indicated, “[A] way must be found to extend water and sewer service to entire lake watershed area to preserve lake quality.” Much of the difference between the age groups can be further explained by the comments left by several respondents: “Perhaps an assisted living facility would do well in place of so many houses being built.” “Need low cost empty nest housing!” “What I do feel is lacking is a small development for elder housing where homes (or apartments) are fairly priced and small.” These comments reflect the different stages of life of the respondents.

F. Resident Demographics

Respondents were asked several demographic questions at the end of the survey as an indication of how the town has changed since the survey done in 1996. These responses have also illustrated a major asset of the town of Cazenovia that few other small towns can attest to. Namely, in a nation with an estimated divorce rate around 43 percent, respondents indicated that 85 percent of them were married. This is an extremely high number that reflects the values and strength of life in Cazenovia. In addition, the average household income of respondent’s falls around $75,000 annually which is also very strong compared to the national average. This is a good indicator for Cazenovia business owners as well.

In another question, respondents were also asked to identify their employment status. In a nation with a national annual unemployment rate of 4.6 percent and a state with an annual unemployment rate of about 4 percent, Cazenovia respondents indicated that 0.65 percent were unemployed. In this employment status question, respondents also indicated that approximately 18 percent were retired and 8 percent were not employed and not seeking employment. With over 50 percent of respondents indicating that they were employed full-time, we also assessed the employment status of their spouses. Respondents indicated that 70 percent of their spouses were employed. The question did not break down the unemployed choice as before, thus it is difficult to tell if the remaining 30 percent of spouses are retired, unemployed or not seeking employment.

The location of places of employment and the distances residents commute can have a large impact on their use of the business district and the kinds of services they use within the Cazenovia Business District. Respondents were asked to identify the towns that they worked in as well as the towns that their spouses worked in. Towns were identified based on miles from the

Cazenovia Business District and broken into ranges. The 0 to 10 mile range includes Cazenovia, Manlius and Chittenango. East Syracuse, Hamilton, Fayetteville, Syracuse and DeWitt are towns identified in the 11 to 25 mile range. Other towns belonging to the 26 to 50 miles range were Liverpool, Homer and North Syracuse. The range category of over 50 miles from Cazenovia was identified as working in another state or general regions (ie Central New York region) where work occurs. Several respondents also indicated either themselves or their spouses as working in Rochester, Buffalo or Albany.

Results indicated that 51 percent of respondents work within ten miles of Cazenovia with over 43 percent of respondents identifying Cazenovia as their location of business. A total of 92 percent of respondents identified a town within 25 miles as the location of their place of business. Respondent spouses displayed a slightly different pattern with approximately 41 percent working within ten miles and 57 percent working in the 11 to 25 mile range. Eighty eight percent of respondent's spouses work within 25 miles of Cazenovia, which is significantly lower than the respondents themselves. Also, only 30 percent of respondents indicated that their spouse worked inside of Cazenovia. This difference in employment locations could be a reflection of the gender difference of respondents (68 percent of respondents were females) as national studies show that males tend to work farther from home.

Due to the digital nature of life today, respondents were asked a question regarding their internet service usage and their opinion of wireless internet availability in the business district. Around 35 percent of respondents indicated that they used Time Warner's Roadrunner as their internet provider; however the largest group of respondents was in the "other" category with 37 percent. These "other" providers were listed as being Windstream, NetZero, Frontier or Alltel. The service providers listed tend to match the general population shift from dial-up providers such as NetZero or AOL to the cable and/or DSL providers like Verizon and Roadrunner. A total of 88 percent of all respondents indicated that they had some form of internet service, a number that is higher than the national average of 64 percent of households. When asked of their interest in wireless internet availability within the business district, only approximately 43 percent of respondents indicated that they were interested.

G. Orange Consulting Group 1996 Study

In 1996 the Orange Consulting Group of Syracuse University, a predecessor to the current Whitman Consulting Club, performed a market research survey of the town of Cazenovia in order to assess several items. Their main objective was to determine what services residents patronized inside of Cazenovia and which ones they patronized outside Cazenovia. They were interested also in what the main factors were that kept residents from conducting business within the Cazenovia business district and what, if any, services were needed to attract residents back into the business district. Other objectives were to obtain an image of the community from residents' eyes, to assess recreational usage and to compile demographics of the area. As one may notice, the objectives of the 1996 survey are very similar to the objectives of the 2006 survey described previously.

Without going into great detail for the 1996 results, several similarities and differences are highlighted between the two separate surveys. Perhaps the most interesting similarity between the two surveys done a decade apart is the use of services within the business district and the preferences for service usage that exist among the residents. Several services were indicated in both surveys as being done more inside of Cazenovia and services like grocery trips, car servicing and clothing shopping were done outside of the business district by respondents in both years. Respondents also indicated similar usage preferences in question four of the survey. For example, a farmer's market would be used at least monthly by residents in both surveys. Another strong similarity is in the attitudes respondents indicated towards parking and the kinds of services offered in the business district. Opinions regarding prices of goods and services also remained fairly similar between surveys. Recreational usage and what types of recreation also remained constant over the two surveys with the lake serving as the main recreational source for respondents.

In addition to opinions regarding the kinds of services offered and used in the business district, a very positive similarity between the two surveys are the resident's perceptions of the village. In 1996, respondents indicated their top four adjectives used to describe the village were quaint (62 percent), expensive (52 percent), well-kept (51 percent) and friendly (50 percent). While the 2006 survey showed a much more diverse range of responses, these exact four words were also used most often by the current respondents to describe their town. Quaint was chosen by 64 percent of respondents with expensive gaining 52 percent of responses. Respondents also indicated that well-kept and friendly also reflected how they viewed their town, both with 48 percent of the responses.

While several similarities were observed between the 1996 survey and the 2006 survey, a few differences between the two were also seen. As a product of the information age and the impact of the internet on commerce across the globe, residents of Cazenovia are also transitioning their business online. The use of the internet in online purchases is especially strong among respondents buying books, clothing, gift items, renting a video or booking travel. With the use of services inside the business district, a higher number of 2006 respondents indicated that it was more convenient for them to conduct their business elsewhere or that they preferred services that were located outside of Cazenovia. In 1996, a total of 43 percent of respondents indicated that they felt it was more convenient to shop elsewhere; in 2006 that number rose to 59 percent. These services preferred outside Cazenovia included full grocery trips or to purchase gasoline. Many respondents in both surveys, however, expressed their opinions regarding the grocery services available in Cazenovia and also indicated that they would be more willing to perform their shopping with changes to the existing store. The final difference seen between the two surveys is in the number of services that are no longer used as frequently as they were in 1996. Insurance services, dry cleaning and travel agencies were all indicated being used "not at all" by a greater number of respondents in the current survey. Some of these changes may be due to the availability of technology allowing customers to perform the services either online or in the comfort of their own home.

Several demographic changes were also observed between the two surveys. Respondents in the 2006 survey were mainly female (68 percent) from the 55 and over year old age group (49 percent). In 1996, respondents were 71 percent female mainly from the 41 to 55 year old age group. Employment characteristics of respondents have also changed between the two surveys. As described above a total of 63 percent of respondents are working outside of the home with approximately 67 percent working outside of Cazenovia. This is compared to respondents of the 1996 survey who had 60 percent working outside of the home and only 29 percent working inside of Cazenovia. Another extremely positive demographic shift is in the household incomes of respondents. In 1996, the average household income of respondents was around $68,000 per year, which at the time was $20,000 more than the national average. In the 2006 survey, over 2/3 of households reported incomes of over $50,000 and the average income was around $75,000 annually.

H. Conclusion

As in 1996, many positive items have come out of the business district survey. Residents feel very strongly about their town and the passion that they have displayed in the comments and responses are a huge asset to business owners. Respondents have indicated that they want their opinions heard and many comments indicated a strong reaction towards this survey. Cazenovia is a great town with excellent residents who are committed to supporting each other and want to live in a special place. “We love the village of Cazenovia and always feel proud to show the village off to our out of town visitors. Without exception we hear highly complimentary comments.” The future holds many changes for towns big and small throughout the United States. With careful planning and support of residents, positive changes can be made and maintained to ensure Cazenovia remains the great place it is today.

Exhibit: Survey Letter and Survey

Cazenovia Market Development Survey
Sponsored by:
Greater Cazenovia Area Chamber of Commerce
Cazenovia Area Community Development Association, Inc.
Syracuse University Whitman Consulting Group

November 8, 2006

Dear Resident of Cazenovia-

You are receiving this survey on behalf of the Greater Cazenovia Area Chamber of Commerce, Cazenovia Area Community Development Association, Inc. and the Syracuse University Whitman Consulting Group. Please take a few moments to answer the following survey as your input is greatly valued for the future development of your community.

The Cazenovia Market Development Study is intended to identify changes that could help improve the prosperity of the Cazenovia business district. We want to highlight the opportunities that residents are currently utilizing and how the proposed changes will more efficiently meet the needs of the customers. We also want to identify areas where customers' overall experience with the Cazenovia area could be improved.

Your identity and responses will be kept completely confidential throughout this process. Your name and / or address will not be released, nor will it be ever be used by the Whitman Consulting Group for any other research or promotional purposes. Please be as honest as possible in your responses and please feel free to include any additional comments that you feel are necessary or that might help us in our assessment.

This survey is also available online for your convenience at
http://share.whitman.syr.edu/sites/student/CazSurvey.

Thank you,

Syracuse University Whitman Consulting Group
Greater Cazenovia Area Chamber of Commerce
Cazenovia Area Community Development Association, Inc.

YOUR EXPERIENCE WITH THE CAZENOVIA BUSINESS DISTRICT
All Responses Will be Held Strictly Confidential

This Survey is also available online at http://share.whitman.syr.edu/sites/student/CazSurvey.

1. During last month, how often did you or any member of your household go to the Cazenovia business district for any reason (*e.g.,* to attend a civic function, to buy gas, to go to church). For our purposes, the Cazenovia business district includes Albany Street and the area through the Plaza.

0.93%	None in Last Month (Go to Question 3)	28.74%	Two or Three Times Each Week
1.50%	Once Last Month	23.09%	Four to Five Times Each Week
6.48%	About Twice Last Month	17.59%	About Once a Day
11.92%	About Once a Week	9.76%	More Than Once a Day

2. Estimate how often in the last month you or a member of your family did any kind of business in the Cazenovia business district (*e.g*., you ate at a restaurant, did your banking, got your hair cut, bought groceries).

1.28%	None in Last Month (Go to Question 3)	35.81%	Two or Three Times Each Week
1.19%	Once Last Month	19.74%	Four to Five Times Each Week
6.39%	About Twice Last Month	11.48%	About Once a Day
18.09%	About Once a Week	6.01%	More than Once a Day

3. Next to each activity below, indicate whether you or members of your household have done that activity in the Cazenovia business district during the past month and whether you or members of your household have done that activity somewhere outside Cazenovia during the past month. If you have done the activity both inside and outside the business district, check both choices. If you did not do the activity at all during the past month, please check "Did Not Do At All", and then indicate, by circling "I" or "O", whether you prefer to do the task inside or outside Cazenovia if you needed to do the activity.

	Did in Cazenovia	Did Outside Cazenovia	Purchased Online	Did Not Do At All	Would You Prefer Inside?	/	Or Outside?
Ate lunch in a restaurant	41.64%	44.83%	0.00%	13.52%	73.99%	/	26.01%
Ate dinner in a restaurant	46.81%	41.21%	0.00%	11.98%	75.88%	/	24.12%
Picked up a fast food or carry out	50.84%	30.03%	0.00%	19.14%	79.61%	/	20.39%
Picked up a few convenience grocery items	56.62%	36.37%	0.00%	7.01%	80.91%	/	19.09%
Did a full grocery shopping trip	42.35%	55.19%	0.18%	2.29%	68.60%	/	31.40%
Picked up hardware and / or lumber	52.60%	33.11%	0.00%	14.29%	82.87%	/	17.13%
Picked up a gift item	31.09%	42.10%	11.11%	15.70%	69.24%	/	30.76%
Had a prescription filled	65.46%	20.30%	2.71%	11.54%	86.99%	/	13.01%
Had my hair done	37.61%	43.17%	0.00%	19.22%	73.93%	/	26.07%
Had my car serviced	27.00%	53.78%	0.00%	19.22%	58.12%	/	41.88%
Bought gas	49.57%	48.51%	0.00%	1.92%	72.50%	/	27.50%
Did my dry cleaning	28.56%	21.99%	0.00%	49.45%	83.93%	/	16.07%
Did my banking	61.25%	32.90%	3.22%	2.63%	86.03%	/	13.97%
Rented a Video / DVD	32.15%	8.66%	11.46%	47.73%	89.96%	/	10.04%
Used legal services	9.17%	21.08%	0.40%	69.35%	62.17%	/	37.83%
Used insurance services	22.62%	32.89%	2.63%	41.87%	56.09%	/	43.91%
Used the services of a travel agency	1.13%	9.85%	11.64%	77.37%	59.89%	/	40.11%
Purchased flowers or a plant	15.52%	28.10%	2.57%	53.80%	73.72%	/	26.28%
Purchased a craft item or fabric	11.20%	32.60%	0.55%	55.66%	67.65%	/	32.35%
Purchased an item of jewelry	8.57%	18.72%	2.14%	70.57%	71.00%	/	29.00%
Purchased an item of clothing	8.15%	54.98%	11.47%	25.41%	52.59%	/	47.41%
Bought a book	11.42%	36.01%	15.25%	37.32%	65.89%	/	34.11%
Visited an Art Gallery / Purchased Art	15.00%	10.82%	1.02%	73.16%	69.83%	/	30.17%
Bought something from an antique dealer	3.16%	7.49%	2.47%	86.87%	67.25%	/	32.75%
Took a pet to the veterinarian	27.81%	13.65%	0.00%	58.54%	75.95%	/	24.05%
Went to a movie / theater production	7.12%	42.63%	0.17%	50.07%	56.27%	/	43.73%
Went to a physician (of any kind)	26.05%	54.44%	0.00%	19.52%	61.33%	/	38.67%
Went to a coffee shop	39.21%	28.17%	0.00%	32.62%	81.00%	/	19.00%
Went to the library	56.32%	10.50%	0.00%	33.18%	92.24%	/	7.76%
Went to a bar or pub	40.31%	21.24%	0.00%	38.46%	80.63%	/	19.37%
Went to a post office	63.37%	26.31%	0.00%	10.32%	85.25%	/	14.75%
Went to a fitness center / gym	20.18%	18.44%	0.00%	61.38%	78.41%	/	21.59%
Used spa services	3.41%	10.48%	0.00%	86.11%	75.48%	/	24.52%
Used optical services	12.57%	18.81%	1.54%	67.08%	64.10%	/	35.90%

4. How often would you be likely to patronize the following kinds of businesses if they were available in the village of Cazenovia? Indicate below how often you or members of your family would take advantage of each of the following opportunities.

	Weekly (5)	Monthly (4)	Every Six Months (3)	Once a year (2)	Never (1)
An Indoor / Outdoor Café	25.58%	40.02%	20.81%	5.78%	7.81%
A dessert & coffee house	21.30%	34.29%	20.98%	10.95%	12.49%
A specialty / gourmet foods store	24.07%	32.66%	16.68%	12.49%	14.10%
More ethnic restaurants: *Name two kinds of ethnic food you prefer:*_________ ______ ________________	15.74%	39.29%	16.86%	7.69%	20.42%
A bakery	33.19%	31.93%	17.76%	7.13%	9.98%
A farmers market	40.99%	31.49%	14.38%	7.83%	5.32%
A health food store	20.54%	28.94%	20.62%	13.57%	16.33%
A bike rental / repair shop	0.49%	2.33%	18.35%	29.94%	48.88%
A shoe store	0.55%	13.55%	37.51%	27.11%	21.28%
A shoe repair store	0.00%	4.43%	28.54%	34.17%	32.86%
A children's clothing store	1.20%	21.60%	24.06%	17.41%	35.73%
A women's clothing store	3.96%	27.89%	32.76%	15.93%	19.45%
A sporting goods store	2.95%	26.46%	27.62%	20.29%	22.68%
A "quick" oil change service center	0.85%	14.47%	36.23%	9.29%	39.15%
A drive-through ATM	34.18%	19.71%	7.37%	4.52%	34.22%
An office supply store	3.04%	26.15%	27.25%	19.47%	24.09%
A picture framing shop	0.44%	3.90%	17.26%	36.49%	41.91%
A music / compact disc store	3.01%	13.14%	23.74%	22.89%	37.21%
A movie theatre	5.46%	37.24%	29.75%	13.74%	13.81%
A place to go dancing	4.61%	12.24%	19.51%	19.39%	44.26%
A health club / recreation facility	23.54%	17.42%	5.14%	7.56%	46.34%
A youth activity center	12.84%	15.61%	6.15%	6.50%	58.90%
A bowling alley	5.09%	8.75%	18.42%	25.12%	42.62%
Boat rentals (kayak and / or canoe)	1.20%	9.53%	16.47%	18.02%	54.78%
A furniture store	0.38%	3.45%	10.75%	41.29%	44.13%
A furniture repair / refinishing shop	0.00%	1.71%	9.60%	42.69%	46.01%
A tailor	0.34%	11.05%	21.96%	29.47%	37.18%
A moderately- priced department store with a wide selection of clothing, office supplies, sporting goods, housewares and gift items	18.41%	39.41%	15.49%	11.25%	15.44%
A discount department store with a wide selection of clothing, office supplies , sporting goods, housewares and gift items	26.96%	37.87%	11.59%	7.76%	15.82%
OTHER____________________________________	□	□	□	□	□

5. Which of the following have you used in Cazenovia during the past year? *Check all that apply.*

8.85%	The Cross – Country Skiing Trails	5.57%	Museums
15.56%	The Biking / Walking Trails	9.15%	Art Galleries
19.47%	Lakeside Activities	10.05%	Playgrounds
18.47%	General Lake Use	1.52%	Skate Park
9.54%	Sports Fields	1.82%	Ice Skating
□	Other (Please Write)		

6. Circle the four words below that best describe the Cazenovia business district as you see it.

Quaint 16.39%	Unattractive 0.98%	Rundown 1.40%	Expensive 13.23%	Accessible 4.16%	Friendly 11.85%
Isolated 1.75%	Convenient 8.01%	Welcoming 8.60%	Progressive 0.26%	Tourist-Oriented 7.17%	
Inconvenient 5.28%	Well-Kept 11.77%	Unfriendly 2.06%	Conservative 4.45%	Reasonably-Priced 2.64%	

7. Indicate the extent of your agreement with each of the following statements regarding the Cazenovia business district.

		Strongly Agree (4)	Agree (3)	Disagree (2)	Strongly Disagree (1)
a)	Cazenovia business district is on my way home from work/school	40.95%	21.47%	18.54%	19.04%
b)	Cazenovia stores are clean and well–kept	35.78%	56.01%	7.77%	0.44%
c)	There is enough parking in the Cazenovia business district	5.27%	30.30%	32.34%	32.08%
d)	The available parking is convenient	6.73%	44.48%	31.40%	17.38%
e)	I feel safe walking in the Cazenovia business district at night	49.12%	45.69%	4.36%	0.83%
f)	Cazenovia stores are open late enough each day for me to patronize them.	11.13%	43.83%	29.91%	15.12%
g)	The selection within Cazenovia stores is adequate.	2.44%	21.61%	54.11%	21.83%
h)	High prices keep me away from stores I would otherwise patronize	16.94%	38.24%	36.29%	8.53%
i)	Cazenovia restaurants offer enough delivery service to suit my needs	8.86%	49.32%	33.43%	8.40%
j)	It's more convenient for me to shop in another town.	20.90%	38.10%	31.83%	9.17%
k)	It's more convenient for me to shop online	12.96%	43.00%	29.14%	14.90%
l)	Service people in Cazenovia stores make me feel welcome	22.92%	61.06%	14.32%	1.70%
m)	Lack of adequate snow removal makes shopping there difficult	5.36%	16.76%	63.07%	14.81%
n)	Cazenovia offers the kind of services I need.	2.06%	40.97%	44.62%	12.36%
o)	Cazenovia offers the kind of products I need.	1.84%	32.65%	53.38%	12.13%

8. What are the 2 most important reasons you do shopping, errands and entertainment outside the Cazenovia business district?

17.95%	High Prices	6.18%	Not Enough Parking
28.04%	Products Needed Not Offered	7.57%	Service Selection is Limited
21.47%	Selection Within Stores Inadequate	9.61%	More Convenient in Another Town
5.65%	Stores are Not Open Late Enough	3.53%	More Convenient / Prefer To Shop Online

Other reasons?____

9. How do you feel about the expansion of the Cazenovia business district in the following areas:

	Will Use Often (4)	Will Use Rarely (3)	Will Not Use At All (2)	Not Interested (1)	Already Too Many Like Businesses in Business District		Would Be Important Addition to Business District	
					Yes	No	Yes	No
Grocery Store	76.61%	13.76%	2.24%	7.39%	33.10%	66.90%	79.44%	20.56%
Convenience Store / Drug Store	34.94%	26.02%	14.92%	24.13%	82.65%	17.35%	29.49%	70.51%
Bank	24.82%	19.12%	27.08%	28.97%	81.73%	18.27%	26.26%	73.74%
Hotel / Motel	1.23%	28.88%	35.88%	34.01%	62.14%	37.86%	53.76%	46.24%
Small Office Space	2.27%	11.88%	42.67%	43.19%	47.97%	52.03%	50.74%	49.26%
Information and / or Space for Weddings / Receptions	1.10%	27.65%	32.19%	39.06%	56.72%	43.28%	49.05%	50.95%

10. How do you feel about residential expansion / new residential development?

14.13%	Would Like to See Residential Expansion / Development	21.28%	Do Not Want to See Residential Expansion / Development
13.60%	Will Have Positive Impact on Village Area	18.36%	Will Have Negative Impact on Village Area
15.21%	Expansion / Development is Necessary	17.41%	Expansion / Development is Not Necessary

Please take a moment to tell us about yourself. *Your responses will be held strictly confidential.*

11. What is your gender? 31.66% Male 68.34% Female

12. How old are you? 0.00% 18-25 13.45% 26- 40 37.35% 41- 55 49.20% 55 above

13. Are you:
50.92% Employed full-time
11.95% Employed part-time
17.93% Working at home for others
8.84% Operating your own business from home
0.65% Unemployed (Go to Question 15)
1.53% Retired (go to question 15)
8.18% Not working outside the home / not seeking employment

14. In what town, village or city do you work?

The town / city of : 0-10 Miles 51.26% 11-25 Miles 42.35% 26-50 Miles 5.31% Over 50 Miles 3.17%

15. If you are married, is your spouse employed? (If you are not married, go to question 17).

70.10% yes 29.90% no → (Continue with question 17).

16. In what town, village or city does your spouse work? 0-10 Miles 40.71% 11-25 56.68% 26-50 5.31% Over 50 16.84%

17. How many months of the year do you live in the Cazenovia area? _____________months

18. Do you have an internet subscription?

12.78% AOL 4.50% Verizon 34.35% Road Runner 36.74% Other 11.63% Do Not Have Internet Service

19. Are you interested in a wireless connection accessible within the business district? 42.74% yes 57.26% no

20. Which of the following do you read on a regular basis? *Check all that apply.*

23.77% The Republican
26.68% The Hi- Neighbor
0.44% The Fayetteville-Manlius Pennysaver
5.89% The Syracuse New Times
32.61% The Post Standard
10.61% News Online

21. What is your annual household income?

2.23% Less than $15,000
4.27% $15,000-24,999
13.04% $25,000-49,999
22.70% $50,000-74,999
18.56% $75,000-99,999
11.10% $100,000-124,999
10.07% $125,000-149,999
6.77% $150,000-174,999
11.27% Over $175,000

22. Estimate how much money your household has to spend each month after you have paid your major bills (i.e. utilities, auto, insurance and groceries). $_________________________________

23. What is your marital status?

6.21% never married 81.27% married 1.02% separated 7.07% divorced 4.43% widowed

24. Indicate below the gender and age of the other members living in your household (not including yourself).

Gender	Age	Gender	Age
1. Male / Female	_______	4. Male / Female	_______
2. Male / Female	_______	5. Male / Female	_______
3. Male / Female	_______	6. Male / Female	_______

Use an additional space to make any other comments. Attach an additional sheet if necessary.

Thank you **very much** for your time.

By December 1, 2006 please return your completed questionnaire to:

Cazenovia Market Development Survey
c/o Greater Cazenovia Area Chamber of Commerce
59 Albany Street
Cazenovia, NY 13035

http://share.whitman.syr.edu/sites/student/CazSurvey.

Cazenovia Development Study

Sponsored by:
Cazenovia Area Community Development Association
Greater Cazenovia Area Chamber of Commerce
Syracuse University Whitman Consulting Group

Village Strengths:

- Abundance of natural resources
    - Recreational usage of bike trails, walking trails, cross country ski trails and lake activities is extremely high among residents
- Resident Support
    - Usage of post office, library, restaurants, hardware and banking is mainly done inside of the Cazenovia business district.
    - Resident image of village is quaint, friendly, well-kept and expensive
    - Residents prefer to conduct their business inside of the Cazenovia business district if the services and / or products needed are available.
- Business District Usage
    - 91% of respondents conduct business in the Cazenovia business district more than once per week

"I live in Cazenovia because I love its rural nature, walking trails, dark nights, lack of "big boxes" and excessive stores."

"We love the village of Cazenovia and always feel proud to show the village off to our out of town visitors. Without exception we hear highly complimentary comments."

Areas for Improvement:

- Available Business District Parking
- Grocery Store Concerns
- Availability of Needed Services and / or Products in the Business District
- Business District Store Improvements
    - High Prices keep residents from conducting business
    - Stores are not open early enough or late enough for most respondents

"My preference would be to support local businesses which I do whenever I can…. The convenience to make purchases/services from local merchants does not meet my needs."

"Nothing would make me happier than if I could shop locally and see my friends and neighbors here."

Expansion Opportunities:

- Limited, Well-Planned and Controlled Residential Expansion
- Residential Opportunities for Lower Income Families and Senior Housing
- Grocery Store Seen as an Important Addition to the Business District

"Way must be found to extend water and sewer service to entire lake watershed area to preserve lake quality. The only constant is change but change must be managed for general good"

"Cazenovia is stuck in 1987 or so, look at Skaneateles, see how far they've come in 20 years."

"As long as expansion is tastefully done it'll be ok. More money in the area is good as long as there are stores and facilities to support them."