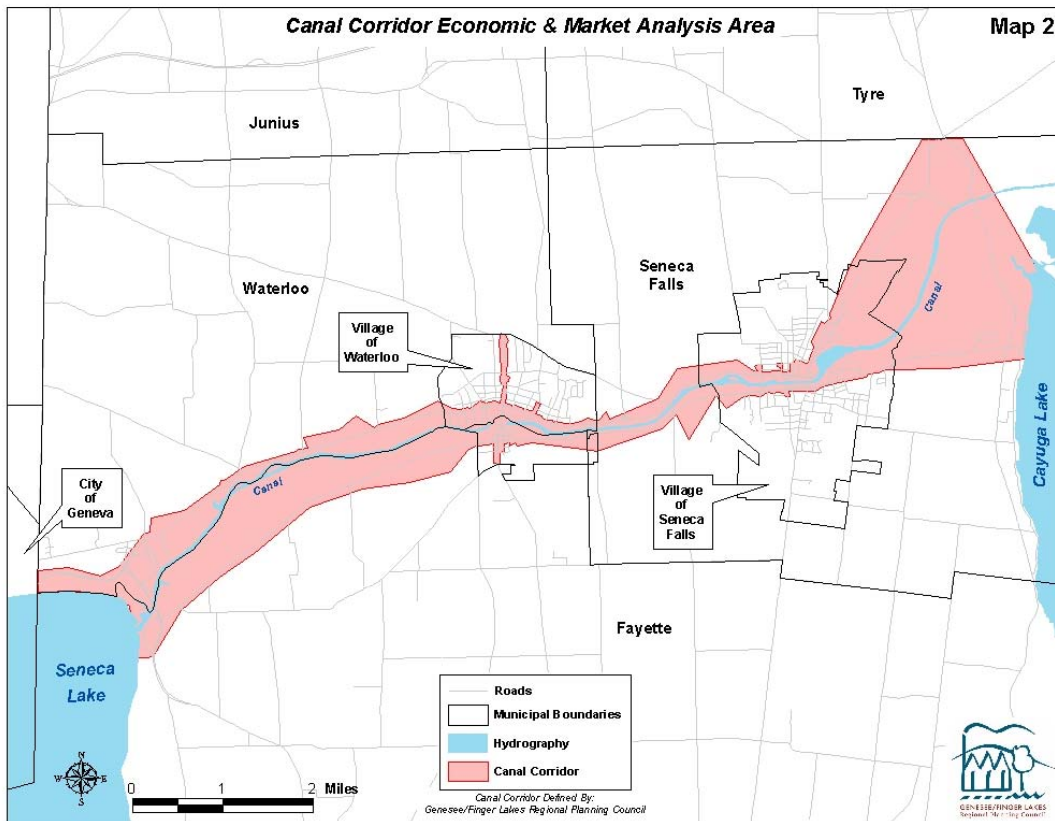


II. EXISTING CONDITIONS

1. General

Corridor Location

The Canal Corridor Economic & Market Analysis is for the Routes 5 & 20 Corridor in northern Seneca County, which is in northwestern New York State (see Map 1). The corridor is bounded by Routes 5 & 20 on the north, River Road (from the Seneca-Ontario County line to the Village of Seneca Falls) and Bayard Street (from the Village of Seneca Falls to the Seneca-Cayuga County line) on the south, the Seneca-Ontario County line on the west and the Seneca-Cayuga County line on the east (see Map 2). The Cayuga-Seneca Canal runs through the corridor.



Demographic & Socio-Economic Conditions

The four communities have a combined population of 17,213 (Census 2000) and cover approximately 48 square miles. With 6,861 residents, the Village of Seneca Falls is one of the two major population centers in Seneca County. Approximately 360 acres of the Village historic core make up New York State Seneca Falls Heritage Area. Recognized as the birthplace of Women's Rights, the Village is also home to the National Women's Hall of Fame and National Park Service's Women's Rights National Historical Park which administers the historic Wesleyan Methodist Chapel and the restored home of Elizabeth Cady Stanton.

The Village of Waterloo, with a population of 5,111, is located approximately two miles west of Seneca Falls. The Village is home to the Memorial Day Museum and Terwiller Museum. Two historic houses administered by Women's Rights National Historical Park are located there: the M'Clintock House and the Hunt House.

For the purposes of using demographic data for the study area, a map was made of the Census tracts in the 5&20 Corridor (see map of Census Demographic Areas in Appendix B). Using the tables below the Census Demographic Areas can also be compared to all of Seneca County as well as the Genesee/Finger Lakes (G/FL) Region (Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming and Yates Counties).

Table 2-1 shows household information. The study area does have a smaller average household size and average family size than the county or the region. This generally indicates an older population and/or a single occupancy situation. Additionally, the study area does have a higher residential renter occupied units versus owner occupied units than the county or the region.

Table 2-1 Households	Study Area	G/FL Region	Seneca County
Total Population	13,956	1,199,588	33,342
Total Households	5,553	456,638	12,630
Family Households Percent	65%	66%	68%
Family Households with Children Under 18	20%	23%	22%
Married Couple Families	2,694	230,459	6,765
Married Couple Families with Percent no Children Under 18	59%	55%	58%
Average Household Size	2.41	2.58	2.51
Average Family Size	2.94	3.07	2.99
Total Housing Units	6,063	495,160	14,794
Percent Housing Units Occupied	92%	92%	85%
Percent Housing Units Vacant	8%	8%	15%
Homeowner Vacancy Rate	2.09	1.67	2.27
Renter Vacancy Rate	10.26	8.39	11.45
Percent Owner Occupied Housing Units	67%	69%	74%
Percent Renter Occupied Housing Units	33%	31%	26%

Table 2-2 shows educational attainment indicating that the study area does have a lower percent of attainment of a bachelor's or higher degree than the county or the region.

Table 2-2 Education

	<i>Study Area</i>	<i>G/FL Region</i>	<i>Seneca County</i>
Total Population 25 and Over	9,659	783,297	22,585
Percent High School Grad or Equivalency	37%	30%	36%
Percent Attained Associate Degree	10%	10%	10%
Percent Attained Bachelor's Degree	10%	16%	11%
Percent Attained Grad or Professional Degree	6%	11%	7%

Table 2-3 show employment and income. The study area does have a slightly higher unemployment rate than the county or the region. The study area does have a lower median household income and mean household income than the county or the region. Additionally, the study area does have a slightly higher percent of households with Social Security income, once again indicating an older population.

Table 2-3 Employment and Income

	<i>Study Area</i>	<i>G/FL Region</i>	<i>Seneca County</i>
Population 16 and Over	11,061	927,739	25,982
Percent Population in Labor Force	59%	65%	60%
Percent Civilians Employed	93%	94%	94%
Percent Civilians Unemployed	7%	6%	6%
Workers 16 and Over	6,043	560,690	14,486
Percent Drove to Work	92%	91%	92%
Percent Drove Alone	83%	82%	81%
Percent Carpooled	10%	9%	10%
Percent Used Public Transport for Work	0%	2%	0%
Percent Walked to Work	4%	4%	3%
Percent Bicycle to Work	0%	4%	0%
Percent Took Other Means to Work	1%	0%	1%
Percent Worked at Home	2%	3%	4%
Median Household Income	\$34,122.07	\$40,653.56	\$37,140.00
Mean Household Income	\$41,623.47	\$49,270.76	\$45,404.61
Percent Households with Social Security Income	34%	27%	33%
Percent Households with Public Assistance Income	3%	4%	2%

2. Associated Land Use Plans and Controls

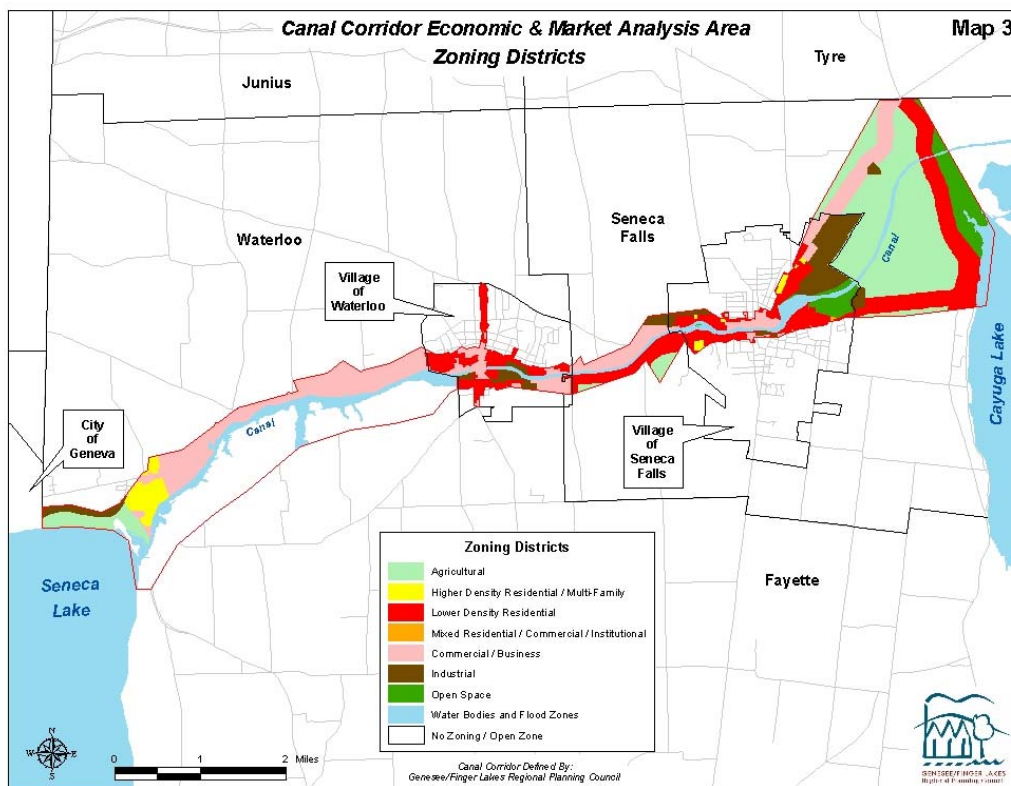
Comprehensive Plan

There is a Comprehensive Plan for the Town and Village of Seneca Falls (1969) and the Town of Waterloo (2000). While the Town and Village of Seneca Falls Comprehensive Plan is over 30 years old it does have a Central Business District Plan which states that "The Seneca Falls Central Business District Plan is designed to retain its position as a community retail shopping center for the Village. The business district is proposed as a comparison shopping center containing specialty shops and commercial services that will satisfy the weekly shopping needs of the community."

The Town of Waterloo's Comprehensive Plan does have several recommendations in the relation to the canal corridor. They include:

- To promote additional mixed development in the corridor between the railroad and the canal.
- To promote more concentrated development of areas adjacent to the Village of Waterloo.
- To discourage, when possible, strip development along major Town roads.
- To provide incentives aimed at minimizing the number of driveway cuts and other potential conflicts on the most important carriers.
- New or expanded retail development that will satisfy many of the personal service and daily shopping needs of Town residents and does not need a regional population for survival.
- Local regulations that are conducive to retaining existing businesses and attracting new ones. To establish regulations that will help achieve a high standard for site planning, lighting, signs, landscaping, and general appearance of commercial and industrial land use.

The Town of Waterloo's Comprehensive Plan also states that in Mixed Use areas, such as the area adjacent to Routes 5 & 20, that "effort should be made whenever possible to upgrade the physical appearance of this strip through landscaping, sign control, and similar measures. Random, uncoordinated growth in the past has created an overall visual character of substantial disorder and lack of planning. If this condition can be improved slowly over the next 10 or 15 years the Town will be the beneficiary."



Zoning

The four municipalities of the Towns and Villages of Seneca Falls and Waterloo have zoning ordinances. The zoning districts are largely commercial and lower density residential with some industrial zoning in the villages (see Map 3). The four municipalities of the Towns and Villages of Seneca Falls and Waterloo have sign ordinances within their zoning ordinances. In general they have guidelines for the Historic (where applicable), Residential, and Commercial and Manufacturing Districts. Billboards are prohibited in the Village of Seneca Falls, the residential districts in the Village of Waterloo and the Town of Seneca Falls. There are also General Regulations that give guidelines for the construction and maintenance, location, placement, and permitting of signs.

Local Waterfront Revitalization Program

There is a Local Waterfront Revitalization Program (LWRP) process underway for the Seneca Falls/Waterloo portion of Seneca County. It includes Cayuga Lake, Seneca Lake, and the Cayuga-Seneca Canal, as well as portions of each of the four municipalities, which are directly related to, or generally supportive of, regional efforts to protect natural and cultural resources and stimulate additional tourism and economic revitalization.

3. Land Use

In order to analyze the existing land use and conditions of the Corridor, the Genesee/Finger Lakes Regional Planning Council (G/FLRPC) implemented a systematic approach to complete a Parcel Inventory (see Parcel Inventory form in Appendix C). An inventory form was printed for each parcel in the corridor; these surveys included basic information contained in Real Property Services (RPS) database, as well as other desired information added by G/FLRPC and Thoma Associates. Next, the process of inventorying each parcel was completed. This was accomplished by first visually observing the parcels and filling out hardcopy surveys and finally, by taking digital photographs of each parcel. Two thousand, three hundred and eighty six parcels were surveyed in the corridor. With the hardcopy inventory forms completed, a database was created to store the information. The final result of this process is an inventory of all the parcels in the corridor in the form of a database that can be sorted by any desired characteristic. In addition, the database contains a unique identification number that corresponds to the number of the parcel's associated photograph(s), which provide a visual inventory to compliment the statistical information.

Based on the Parcel Inventory, Table 2-4, General Conditions of Parcels shows that over 53% of the parcels in the corridor are in excellent condition, over 32% of the parcels are in good condition, over 11% of the parcels are in fair condition, and just of 2% of the parcels are in poor condition. Table 2-6 describes the General Conditions rankings.

Table 2-4 Existing Conditions Inventory, General Condition of Parcels

Excellent		Good		Fair		Poor	
Number	% of Corridor	Number	% of Corridor	Number	% of Corridor	Number	% of Corridor
1061	53.61	650	32.85	223	11.27	45	2.27

Table 2-5 describes the General Condition of the Parcels by Land Use. It is notable that approximately 12% of the residential parcels are in the fair and poor condition range, while over 22% of the commercial parcels ranked in the fair and poor condition range.

Table 2-5 General Condition of Parcels (by Land Use)

	Agricultural	Residential	Commercial	Recreation & Entertainment	Community Service	Industrial	Public Services	Wild, Forested, Conservation Lands and Public Parks
Excellent	2	864	148	7	27	7	6	0
Good	3	509	120	4	8	6	0	0
Fair	0	154	66	1	0	1	1	0
Poor	1	32	10	1	0	1	0	0

Table 2-6 General Condition Explanation

Excellent	Building is well maintained and has no visible flaws or signs of deterioration
Good	Building has very few flaws and/or only minor signs of deterioration. Limited areas of faded or peeling paint; some masonry in need of repair; windows, doors, and roofing in generally good condition
Fair	Building has a number of obvious flaws and shows signs of deterioration. Paint is peeling, cracked, or faded; masonry is deteriorated; window, doors, and roofing in need of repair
Poor	Building has many flaws and a great deal of deterioration, including possible structural problems. Paint is badly peeling with bare or rotting wood. Masonry is cracked and in poor condition; windows and doors are broken, missing, or boarded over. Roofs are in an obvious and advanced state of deterioration

Notes: "General Condition of Parcel" was not recorded for vacant parcels or parcels for which the view was obstructed.
Total number of parcels for which general condition was recorded = 1,979.

Table 2-7 illustrates that the major type of repairs needed in the corridor is painting, followed by roofing, windows and doors, and foundation work.

2-7 Types of Repairs Needed

	Masonry	Roofing	Porch	Window / Doors	Painting	Siding	Foundation	Signage	Other
# of Parcels	18	227	97	167	543	82	103	39	3

As Table 2-8 illustrates there are 345 vacant lots (14%), 23 vacant buildings (less than 1%), and 1111 historic buildings (over 46%) in the corridor. This appears to represent a significant opportunity for positive corridor development.

2-8 Vacant / Historic Parcels

	Number	% of Corridor
Vacant Lots	345	14.46
Vacant Buildings	23	0.96
Historic Buildings	1111	46.56

Notes: Total number of parcels included in this parcel inventory = 2,386.
 Buildings are considered historic for the purposes of our inventory, if they were built prior to 1952.
 Year built information was collected from Real Property data provided by New York State Office of Real Property Services.

Tables 2-9 and 2-10 pertain to non-residential structure in the corridor. Table 2-9 indicates that over 33% of the parcels are non-residential (mostly commercial and industrial) and that there is an average of 3.46 storefronts for commercial parcels with multiple storefronts. Table 2-10 indicates that the majority of the non-residential multi-floor structures are two story buildings, followed by three and four story buildings.

Table 2-9 Non-Residential Structures

	Number	% of Corridor
Non-Residential	801	33.57

	Parcels with Multiple Storefronts	Storefronts per Parcel (parcels with multiple storefronts)
Storefronts	13	3.46

2-10 Multi-Floor Structures (Non-Residential)

	2 Floors	3 Floors	4 Floors
# of Parcels	33	26	3

4. Business Survey

The analysis of existing conditions also required a second inventory component, a survey of businesses in the corridor (see Business Survey form in Appendix D). Parcels with businesses were selected from the parcel inventory and a business database was created.

To account for parcels with multiple businesses a second identification field was added to retain a unique way to identify the businesses. Distribution of the business surveys was accomplished via mail. Along with the survey, a letter was drafted and sent with a brief description of the project. Reminder postcards were sent out as a follow-up to businesses that had not returned the surveys. With returns still very low, telephone calls were made to businesses with available contact information in an effort to encourage more responses. Overall, 57 of the 297, or 19.2 % of the surveys were returned completed (*Note - statistically valid studies require a minimum of 18 % participation, this survey achieves that threshold by a small margin). A small percentage of the others were returned by the post office indicating the address information was incorrect, therefore those businesses did not receive the surveys (in cases where the correct address could be determined, the surveys were resent). With the survey results gathered, the final step was to populate the database with the information from the hardcopy surveys, as was done with the parcel inventory database.

In general survey analysis (see Table 2-11) indicates the following:

- Average survey responses indicated respondents were generally satisfied. Responses averaged between three and four on a scale of one to five.
- Assistance provided by the County government ranked lowest followed closely by assistance from municipal government.
- High marks were given to police departments/sheriff, as well as the safety and security of the area.
- The Village and Town of Waterloo were less apt to be satisfied with existing conditions than Seneca Falls. This is likely to be due to the significant State and federal investments in the Village of Seneca Falls.
- The Village and Town of Waterloo were far more dissatisfied with the County Tourism Office than any other entity, indicating that a greater level of assistance in this area may be required.
- By a wide margin, local residents have the greatest impact on businesses, with canal users and the Outlet Mall having the least. This would seem to indicate that there is potential opportunity to increase the impact of those markets.
- Responses from "tourism" related businesses were commensurate with the overall business community, although impact from the canal and special events was much greater (it should be noted that "tourism" businesses had a low response rate).

Table 2-11 - Business Survey Results					
	V of Seneca	T of Seneca	V of	T of	
	Falls	Falls	Waterloo	Waterloo	TOTAL
Appearance of Buildings/Storefronts in Immediate Area:	3.57	3.71	2.80	3.27	3.20
Appearance/Condition of Public Amenities/Spaces In Immediate Area (such as sidewalks, lighting, street furniture, parking):	3.66	3.33	2.82	2.72	3.18
Cost of Renting Commercial Space:	3.55	3.00	3.54	3.00	3.25
Safety/Security of Your Area:	4.00	4.00	3.70	3.27	3.80
Mix Between Retail & Service/Office Businesses:	3.45	3.16	2.90	2.81	3.18
Please Rank the Cooperation/Assistance Provided by the Following:					
Municipal Government	2.90	3.83	3.29	2.80	3.10
County Government	3.10	3.50	3.10	3.10	3.07
Chamber of Commerce	3.36	3.60	3.35	3.10	3.30
Tourism Office	3.55	3.80	2.82	2.50	3.12
Business Association(s)	3.30	3.60	3.58	3.33	3.36
Police Department/Sheriff	4.30	4.00	4.47	3.50	4.00
Please Rank the Level of Impact the Following Have on Your Business:					
Local Residents	4.65	4.14	4.65	3.50	4.30
Visitors/Tourists	2.74	2.00	2.74	3.27	2.64
Canal Users	2.42	1.60	2.42	2.60	2.13
Finger Lakes Outlet Mall	1.80	2.10	1.80	2.40	2.19
Special Events	2.50	2.30	2.50	2.70	2.45
*Each item was ranked 1-5, with 1 being Poor and 5 being very good					

The objective questions on the Business Survey (see Table 2-11) show some corridor assets and opportunities. Based on the business owners filling out the survey the following items appear to be assets within the corridor:

- With the exception of the Village of Waterloo all business owners filling out the survey felt that the appearance of building/storefronts were in the good range.
- In general the business owners filling out the survey felt that the cost of renting commercial space was good.
- Safety/security of the area appears to be an asset
- Municipal government appears to rank better than average in all municipalities. The perception is that the Village of Seneca Falls and the Town of Waterloo needs improvement.
- County government
- Chamber of Commerce
- The County Tourism office appears to get higher marks in the Town and Village of Seneca Falls than in the Town and Village of Waterloo.
- Business associations
- In keeping with the high ranking of safety and security the police department/sheriff appears to be a real asset.
- The impact of local residents on local business ranked very high

Based on the owners filling out the survey the following items appear to be opportunities within the corridor:

- Both in the Village and Town of Waterloo business owners filling out the survey seemed to feel that there was room for improvement with the appearance of buildings/storefronts, the appearance/condition of public amenities, such as sidewalks, lighting, street furniture, and parking, in the immediate corridor area, and the mix between retail and service/office business.
- There appears to be an opportunity for improvement of municipal governments in both the Village of Seneca Falls and The Town of Waterloo
- There appears to be an opportunity for the County Tourism Office to provide enhanced services in the Town and Village of Waterloo.
- While the impact of local residents appears to be high on local business there appears to be a perceived opportunity to attract visitors, tourists and canal users, along with people from the Finger Lakes Outlet Mall and special events to area businesses.

The Business survey also asked two subjective questions. Respondents were asked to please list those factors that negatively impact your business, and they were asked to list any additional comments, ideas, or suggestions. All of the subjective responses are documented in Appendix D.

A summary of the subjective comments included the following:

- Parking
- Advertising and signage
- Conditions
- Municipal government

5. Tourism

The Seneca County Corridor of Routes 5 & 20 exemplifies a realistic connection between communities, history, and commerce. It unites the communities of Waterloo and Seneca Falls and expands its commerce that is shared by tourists, visitors, and residents.

A drive along this route will enhance interest in Women's Rights, the significance of Memorial Day, and the importance of the NYS Canal System and the development of the Cayuga-Seneca Canal. It is a good representation of area architecture and the beautiful homes of our founders. The corridor has quaint gift and antique shops. Conventional dining is available along with fast foods. Accommodations include charming B & Bs or hotels/motels.