MANITOWOC ECONOMIC BASE ASSESSMENT AND MARKET ANALYSIS

Vandewalle & Associates, Inc.
September 2009

The following is a technical document developed to inform the Comprehensive Plan and Special Area Studies.

Table of Contents

Introduction and Purpose

The Economic Base Assessment and Market Analysis appendix provides an overview of current economic conditions and market trends in Manitowoc and in key retail areas within the City. The purpose of completing this analysis as part of the City's Comprehensive Plan update is to provide data to support the concepts and recommendations that emerged in the *Plan* and to give some basic insight into the market position of the City within the larger region.

This analysis will provide some useful insights into current conditions and market-viable opportunities. However, on its own, this analysis has limited value as a tool to shape the City's choices moving into the future. The true value of this appendix comes when the information is combined with the larger, "big-picture" ideas identified through the "Opportunities Analysis" process and the concepts and strategies documented in the Comprehensive Plan, Downtown Plan, and Expo Grounds Master Plan. The quantitative market data provides a base understanding of Manitowoc's current market conditions and trends, while the Opportunities Analysis looks at larger regional assets and emerging opportunities to identify ways to shape the market's future direction and orientation.

The economic and market data in this appendix should help bring the concepts of the City's Plans into sharper focus and give the City's leadership, as well as the development community, a greater understanding of overall economic conditions. This analysis opens the opportunity for more in-depth market and feasibility analyses focused on specific industry sectors, specific development opportunities, or more specific geographies within the City.

In order to provide a summary of current economic conditions, industry strengths and competitive advantages, and retail market positions of key areas of the City, this analysis includes four sections:

1. **Community Economic Base Assessment –** The Economic Base Assessment provides an overview of Manitowoc's workforce and key industry sectors. The information gives insight into what industries are most vital to Manitowoc's economy and highlights "export" industries in which Manitowoc has a competitive advantage.

2. **Harbor Town Market Analysis –** The City has branded the northeast quadrant of the area surrounding the Interstate 43/Highway 151 "Harbor Town." This section provides an analysis of this area's retail market position, trade area, and characteristics.

3. **Downtown Manitowoc Market Analysis –** Manitowoc's downtown area plays a unique role in the City's retail marketplace. This analysis will provide an overview of the downtown's position in the region as a retail destination.

4. **Northside Market Analysis –** As a somewhat older, more local retail district, the role and future of Manitowoc's Northside retail district needs to be understood. This analysis will provide some insight into how this area relates to other retail districts in Manitowoc and throughout the region.

Finding data that is accurate and recent, as well as geographically specific is always a challenge for economic and market studies. The data collected and analyzed comes from a variety of sources and

includes both state and nationally collected data as well as data supplied by state and local sources. Much of the demographic and retail data comes from ESRI, which is a Geographic Information Systems software development and geodata company. ESRI uses a variety of government data sources (primarily from the decennial U.S. Census) combined with internal quantitative algorithms to create annual estimates and five-year projections of demographic, workforce, retail, and housing data. ESRI's estimates are based on broad-brush methods and do not recognize unique local events or trends. Other data sources used in this analysis include business and workforce data from the State, as well as local data sources including the recent community survey and past plans and reports.

Manitowoc Economic Base Analysis

Workforce Overview

As an older, established Wisconsin City, Manitowoc's economy and labor force still includes a large number of manufacturing companies and jobs. In addition to manufacturing, the retail and service sectors are also major employers in the City and the downtown area. Government related positions are also prominent in the downtown and provide about 1,000 jobs or about 17% of the downtown's total employment.

Figure 1: Workforce Snapshot

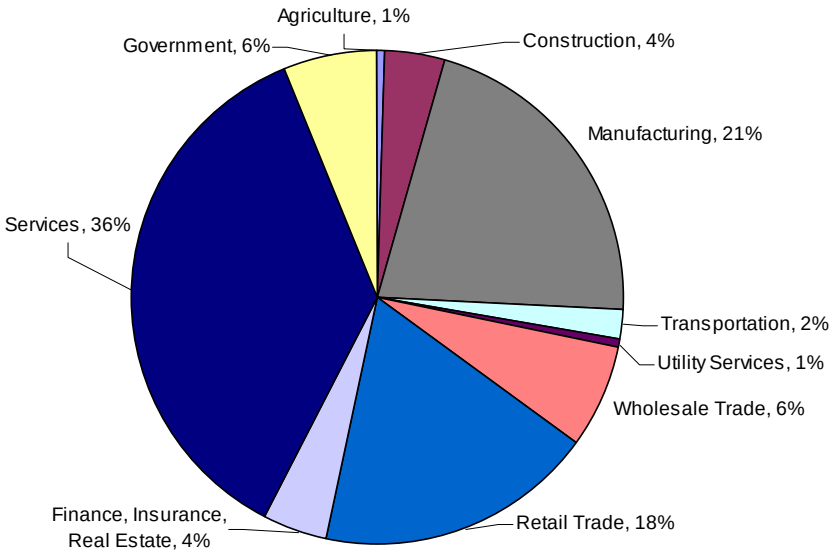
- Manitowoc is home to about 21,000 jobs and 1,500 businesses.
- The largest employment sectors in Manitowoc are services (35%), manufacturing (21%), and retail (18%).
- About 5,600 people work in downtown Manitowoc representing about 25% of the City's total workforce.
- The largest employment sectors in the downtown area are services (36%), retail (18%) and government (17%).
- Compared to state benchmarks, Manitowoc has an unusually high percentage of jobs in utilities, banking, wholesale trade, and manufacturing.

Sources: ESRI, Wisconsin Dept. of Workforce Development 2008

City and County Location Quotients

Manufacturing is an important component of the local economy. City and County data on employment by sector reflects the importance of manufacturing as a provider of jobs for area residents. According to 2007 data, approximately 21% of the City's jobs and 23% of County jobs are in the manufacturing sector compared to 16% statewide (Figure 1). In addition to manufacturing, services and retail also comprise a large share of the City's employment base with 36% and 18% respectively.

Figure 2: City Employment Percentage by Sector



Sources: ESRI, Wisconsin Dept. of Workforce Development 2008

Location Quotients are tools to further analyze the relative strengths of different employment sectors in Manitowoc and Manitowoc County. Rather than simply looking at numbers of jobs or percentage of the workforce in certain industries, Location Quotients benchmark local industries

against State averages by showing the ratio of employment in each industry to total employment and comparing that to the ratio for the State as a whole.

If the local ratio of jobs in a particular sector to total jobs is higher than the state ratio, the Location Quotient is greater than one and the local area is specialized in this sector and the sectors production in the local area most likely exceeds local consumption. Conversely, a local ratio less than the statewide ratio translates into a Location Quotient less than one and suggests that the local area is importing goods in this sector.

Industries where a community's Location Quotient is greater than one indicate an above average percentage of employment. A Location Quotient significantly higher than 1 indicates an industry that is unusually prominent in the area. As shown in Table 1, for the City of Manitowoc, the base industries with Location Quotients greater than one include manufacturing, utilities, and wholesale trade. For the County, the agriculture and construction industries are also export sectors with Location Quotients greater than one.

Table 1: Base Industry Employment Data

	City of Manitowoc			Manitowoc County		
	Number of Jobs	Percentage of Total Jobs	LQ	Number of Jobs	Percentage of Total Jobs	LQ
Agriculture & Mining	110	1%	0.5	586	2%	**1.4**
Construction	827	4%	0.9	1,978	5%	**1.2**
Manufacturing	4,450	21%	**1.3**	8,547	23%	**1.4**
Transportation	395	2%	0.6	971	3%	0.9
Communication	66	0%	0.6	92	0%	0.5
Utility Services	147	1%	**2.0**	198	1%	**1.5**
Wholesale Trade	1,352	6%	**1.3**	2,098	6%	**1.2**
Retail Trade Summary	3,851	18%	0.9	6,700	18%	0.9
Finance, Insurance, Real Estate	840	4%	0.7	1,221	3%	0.6
Services	7,635	36%	1.0	12,995	35%	0.9
Government	1,253	6%	0.9	1,928	5%	0.8
Other	95	0%	**1.9**	99	0%	**1.1**
Totals	**21,021**			**37,413**		

Sources: ESRI, Wisconsin Dept. of Workforce Development 2008

Table 2 shows Location Quotients for the City and Manitowoc County for more detailed industry sectors and lists those sectors from highest to lowest based on the Location Quotient for the City. As shown, utilities, food stores, banking, and wholesale trade top the list in terms of the sectors in which the City has disproportionately high level of employment. In other words, these sectors with a Local Quotient greater than one are assumed to have a greater share of the state market, and can be considered to be "basic" in that they probably export some of their goods and services to non-local areas, thus providing enhanced income and employment to the City.

Table 2: Location Quotients for Detailed Sectors

	Number of Jobs			Location Quotient	
	City of Manitowoc	Manitowoc County	Wisconsin	City	Manitowoc County
Utilities	100	110	4,831	**2.8**	**1.7**
Food and Beverage Stores	930	1,551	77,623	**1.6**	**1.5**
Health Care and Social Assistance	4,599	6,018	384,094	**1.6**	**1.2**
Banking	484	674	43,551	**1.5**	**1.2**
Wholesale Trade	1,298	2,059	133,868	**1.3**	**1.2**
Manufacturing	4,419	8,527	460,104	**1.3**	**1.4**
General Merchandise Stores	505	582	59,796	**1.1**	0.7
Legal Services	159	184	20,420	**1.1**	0.7
Food Services and Drinking Places	1,406	2,430	194,988	1.0	0.9
Public Administration	1,253	1,928	174,771	1.0	0.8
Accommodation and Food Services	1,631	2,752	240,385	0.9	0.9
Retail Trade	2,415	4,209	366,437	0.9	0.9
Construction	836	2,006	132,499	0.9	**1.1**
Miscellaneous Store Retailers	191	355	30,617	0.8	0.9
Motor Vehicle and Parts Dealers	304	548	48,789	0.8	0.9
Management of Companies and Enterprises	50	50	8,938	0.8	0.4
Educational Services	1,158	3,363	215,264	0.7	**1.2**
Finance and Insurance	621	902	116,346	0.7	0.6
Automotive Repair and Maintenance	124	239	23,809	0.7	0.8
Information	230	337	46,193	0.7	0.6
Accommodation	225	322	45,397	0.7	0.5
Other Services (except Public Administration)	707	1,351	149,106	0.6	0.7
Real Estate and Rental and Leasing	205	328	44,437	0.6	0.6
Professional, Scientific, and Technical Services	540	856	124,924	0.6	0.5
Arts, Entertainment, and Recreation	299	960	71,023	0.6	1.0
Administrative and Support	256	443	62,173	0.6	0.5
Finance	46	68	11,614	0.5	0.4
Electronics and Appliance Stores	60	106	15,390	0.5	0.5
Health and Personal Care Stores	67	166	17,385	0.5	0.7
Transportation and Warehousing	300	784	79,708	0.5	0.7
Gasoline Stations	32	97	8,861	0.5	0.8
Building Material	148	442	44,087	0.5	0.8
Furniture and Home Furnishings Stores	42	85	13,203	0.4	0.5
Sporting Goods, Book, and Music Stores	52	122	17,869	0.4	0.5
Clothing and Clothing Accessories Stores	61	77	23,192	0.4	0.3
Nonstore Retailers	23	78	9,625	0.3	0.6
Insurance Carriers	91	160	61,181	0.2	0.2
Agriculture, Forestry, Fishing and Hunting	9	273	13,240	0.1	**1.6**
Mining	0	58	1,779	0.0	**2.5**

Source: Wisconsin Dept. of Workforce Development 2008

Harbor Town Market Analysis

The intersection of Interstate 43 and USH 151 on Manitowoc's southwest side is a highly visible and accessible area on two of Wisconsin's most highly traveled highways. The area already includes a number of major national retail chains including Lowe's, Menards, Wal-Mart, and Kohl's Department Store. The City has branded the northeast quadrant of the interchange "Harbor Town" and continues to consider the long-term market potential of the area.

Trade Area Delineation

A trade area is the area from which the majority of the customers of the total volume of business is generated. Identifying an Effective Trade Area (ETA) is a critical tool to understanding market potential at a site. An ETA is essentially a geographic area around a particular store or commercial district that captures the residences of the majority of the customer base. Understanding a site's trade area is an important first step to understanding the market opportunities that exist on that site. The size and shape of an ETA is typically based on a number of factors including distance to the site, drive time distance to the site, competing areas, and the relative attractiveness of the complementary commercial establishments around the site.
To better understand the market potential, a Primary Effective Trade Area (PETA) and a Secondary Effective Trade Area (SETA) were identified. The PETA defines an area where Harbor Town would be a first choice retail area and customers within this area would almost always utilize the Harbor Town district for retail needs. The SETA delineates an area where most retail activity generated by customers within this area would gravitate toward Harbor Town.

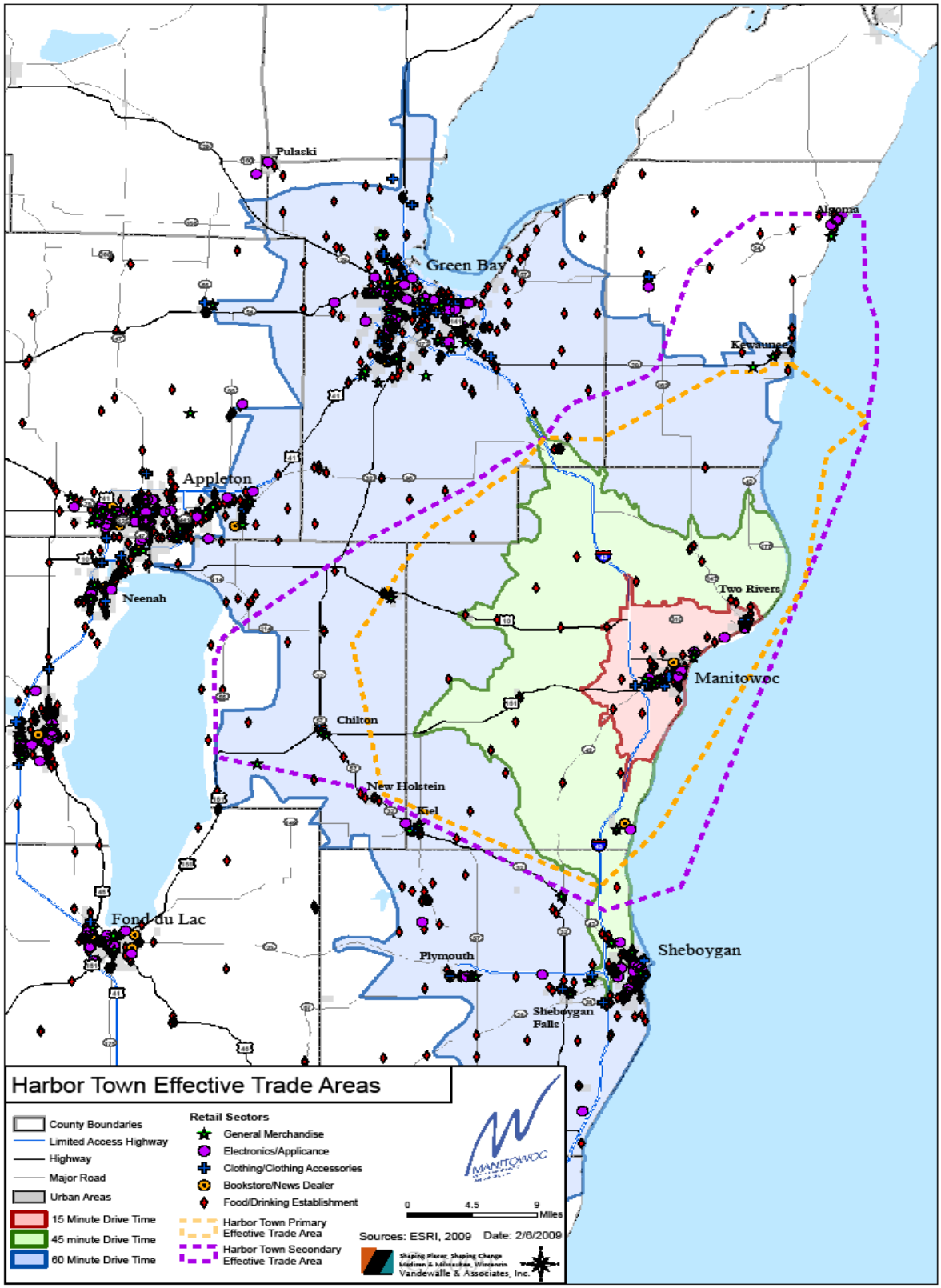
The delineation of the PETA and the SETA is based on three primary tools:

1. **Poll of Existing Retailers:** In order to gain insight in the trade areas for Harbor Town, an interview poll was conducted with the managers of several stores in the area. The managers' responses varied but several mentioned that there are limited offerings for large national retail stores in the immediate area and that the nearest competing areas are Sheboygan, Fond du Lac, Appleton, and the Green Bay area. Therefore, the Harbor Town area captures a relatively large geographic area. One manager estimated a 25-mile radius market draw.

2. **Analysis of Competing Retail Clusters:** Map 1 highlights retail establishments in sectors that may consider locating in the Harbor Town area. As the map shows, there are major clusters of retail activity in the Green Bay, Appleton, and Sheboygan areas. However, areas north and west of Manitowoc have relatively few retail or restaurant offerings indicating that Harbor Town may be able to draw a large share of the customer base within these areas due to the lack of competing retail destinations.

3. **Drive Time Analysis:** Figure 4 shows 15-, 30-, and 60-minute drive times from the Harbor Town intersection. As the map shows, the Interstate 43 corridor stretches the drive time to the south to Ozaukee County, the north edge of the Milwaukee Metro area.

Map 1: Harbor Town Trade Area Map



Trade Area Consumer Profile and Spending Patterns

With a primary and secondary trade area identified for the Harbor Town retail area, it becomes possible to closely examine the characteristics of the customer base living within those areas. Overall, the demographic profiles of Harbor Town's primary and secondary trade area's are very similar in most respects. The median household incomes of the PETA and the SETA are very close, the age distributions are similar, and housing profiles are similar. To provide a snapshot view of the lifestyle and consumer characteristics of the population residing in these two trade areas, ESRI's "Community Tapestry" analysis is a tool that can help provide insight into these characteristics.

The demographics and spending profiles of the consumers captured by the Harbor Town's PETA are shown in Table 3. According to 2008 estimates, the area contains approximately 86,000 people. Overall, the residents of this area are somewhat older than average with a median age of 41, they have relatively moderate incomes with the median household earning about $54,000 per year, and the area is projected to see modest population growth over the next several years with 700 new residents added between 2008 and 2013.

Table 4 highlights demographic and spending patterns of Harbor Town's SETA. This area includes over 115,000 residents and is expected to grow to about 117,000 by 2013. The income, age, and spending habits of these residents closely mirror the PETA profile.

Tables 3 and 4 also highlight consumer spending patterns for Harbor Town's PETA and SETA. The tables show average household expenditures and total household expenditures for different categories of

Figure 3: Community Tapestry Profile for Manitowoc's Harbor Town, Downtown, and Northside Retail Trade Areas

ESRI's Community Tapestry segmentation system classifies U.S. neighborhoods into 65 market segments based on their socioeconomic and demographic composition. Each distinct segment has a unique set of characteristics that reflect the geographic and demographic characteristics of households and provide insight into consumer behaviors. The five most prevalent Tapestry Segments in Primary and Secondary trade areas for Manitowoc's Harbor Town, Downtown, and the Northside.

Salt of the Earth

A rural or small-town lifestyle best describes the Salt of the Earth market. The median age is 40.4 years. Labor force participation is higher than the U.S. level, and unemployment is lower. Above-average numbers of employed residents work in the manufacturing, construction, mining, and agricultural industries. The median household income is $48,800. Households are dominated by married-couple families who live in single-family dwellings, with homeownership at 86 percent.

Green Acres

Green Acres residents live in pastoral settings of developing suburban fringe areas. The median age is 39.9 years. Married couples with and without children comprise most of the households and live in single-family dwellings. This upscale market has a median household income of $62,300 and a median home value of $179,700.

Rustbelt Traditions

Rustbelt Traditions neighborhoods are the backbone of older, industrial cities in states bordering the Great Lakes. Most employed residents work in the service, manufacturing, and retail trade industries. Most residents own and live in modest single-family homes that have a median value of $97,000. Households are primarily a mix of married-couple families, single-parent families, and singles who live alone. The median age is 35.9 years; the median household income is $45,300.

Rustbelt Retirees

Most Rustbelt Retirees neighborhoods can be found in older, industrial cities in the Northeast and Midwest, especially in states surrounding the Great Lakes. Households are mainly occupied by married couples with no children and singles who live alone. Although many residents are still working, labor force participation is below average. More than 40 percent of the households receive Social Security benefits. Most residents live in owned, single-family homes, with a median value of $118,500. Unlike many retirees, these residents are not inclined to move.

Simple Living

Simple Living neighborhoods are found in urban outskirts or suburban areas. Half of the households are singles who live alone or share housing, and 32 percent consist of married-couple families. Approximately one-third of householders are aged 65 years or older; 19 percent are aged 75 years or older. Housing is a mix of single-family dwellings and multi-unit buildings of varying stories. Some seniors live in congregate housing (assisted living). Fifty-five percent of households are occupied by renters.

Source: ESRI

discretionary spending. The Spending Potential Index (SPI) compares local spending with national spending. Values less than 100 represent areas where the local spending is less than the national average, while values greater than 100 represent areas where the local spending is greater than the national average. As the table indicates, consumer spending in the PETA and SETA is below average for almost every category. The only products listed in which residents of these areas spend more than the national average are satellite dishes and recreational vehicles.

Table 3: Harbor Town PETA Demographics and Spending Patterns

Retail Goods and Services

Harbor Town Primary Trade Area

Top Tapestry Segments:		**Demographic Summary**	**2008**	**2013**
Salt of the Earth	28.8%	Population	86,244	86,974
Green Acres	18.1%	Households	35,061	35,735
Rustbelt Traditions	17.0%	Families	23,949	24,207
Rustbelt Retirees	11.6%	Median Age	40.7	42.0
Simple Living	6.1%	Median Household Income	$54,230	$62,502

	Spending Potential Index	**Average Amount Spent**	**Total**
Apparel and Services	70	$1,891.42	$66,315,137
Men's	71	$350.88	$12,302,190
Women's	68	$641.95	$22,507,338
Children's	79	$329.27	$11,544,455
Footwear	57	$275.03	$9,642,836
Watches & Jewelry	83	$184.99	$6,485,801
Apparel Products and Services (1)	86	$109.31	$3,832,517
Computer			
Computers and Hardware for Home Use	82	$172.31	$6,041,189
Software and Accessories for Home Use	79	$22.84	$800,675
Entertainment & Recreation	88	$3,267.13	$114,548,862
Fees and Admissions	83	$512.06	$17,953,330
Membership Fees for Clubs (2)	84	$138.88	$4,869,398
Fees for Participant Sports, excl. Trips	85	$97.30	$3,411,408
Admission to Movie/Theatre/Opera/Ballet	79	$117.67	$4,125,755
Admission to Sporting Events, excl. Trips	82	$49.98	$1,752,403
Fees for Recreational Lessons	85	$107.76	$3,778,264
Dating Services	78	$0.46	$16,102
TV/Video/Sound Equipment	85	$1,225.69	$42,973,762
Community Antenna or Cable TV	89	$657.41	$23,049,481
Televisions	80	$235.74	$8,265,355
VCRs, Video Cameras, and DVD Players	90	$30.04	$1,053,354
Video Cassettes and DVDs	85	$55.31	$1,939,253
Video Game Hardware and Software	87	$31.04	$1,088,170
Satellite Dishes	100	$1.11	$38,747
Rental of Video Cassettes and DVDs	83	$42.35	$1,484,999
Streaming/Downloaded Video	77	$0.62	$21,744
Sound Equipment (3)	79	$167.24	$5,863,699
Rental and Repair of TV/Radio/Sound Equipme	83	$4.82	$168,960
Pets	95	$422.16	$14,801,527
Toys and Games	87	$129.12	$4,527,164
Recreational Vehicles and Fees (4)	98	$428.90	$15,037,585
Sports/Recreation/Exercise Equipment (5)	82	$177.75	$6,232,132
Photo Equipment and Supplies (6)	88	$112.42	$3,941,669
Reading (7)	90	$259.03	$9,081,693
Food	87	$7,214.44	$252,945,652
Food at Home	87	$4,263.43	$149,480,218
Bakery and Cereal Products	88	$596.33	$20,907,768
Meat, Poultry, Fish, and Eggs	87	$1,064.49	$37,321,924
Dairy Products	88	$490.56	$17,199,450
Fruit and Vegetables	85	$702.73	$24,638,308
Snacks and Other Food at Home (8)	88	$1,409.34	$49,412,768
Food Away from Home	86	$2,951.01	$103,465,434
Alcoholic Beverages	83	$494.16	$17,325,740
Nonalcoholic Beverages at Home	88	$388.10	$13,607,349

Source: ESRI

Table 4: Harbor Town SETA Demographics and Spending Patterns

Retail Goods and Services

Harbor Town Secondary Trade Area

Top Tapestry Segments:		**Demographic Summary**	**2008**	**2013**
Salt of the Earth	33.9%	Population	115,813	117,464
Rustbelt Traditions	16.2%	Households	47,019	48,226
Green Acres	14.9%	Families	32,206	32,737
Rustbelt Retirees	8.6%	Median Age	40.7	42.0
Simple Living	4.6%	Median Household Income	$53,554	$61,950

	Spending Potential Index	**Average Amount Spent**	**Total**
Apparel and Services	69	$1,852.80	$87,116,644
Men's	69	$343.39	$16,145,920
Women's	67	$627.60	$29,509,081
Children's	78	$324.87	$15,275,264
Footwear	56	$270.32	$12,710,152
Watches & Jewelry	81	$180.98	$8,509,312
Apparel Products and Services (1)	84	$105.64	$4,966,915
Computer			
Computers and Hardware for Home Use	80	$168.59	$7,927,152
Software and Accessories for Home Use	77	$22.17	$1,042,435
Entertainment & Recreation	87	$3,241.89	$152,430,407
Fees and Admissions	80	$494.17	$23,235,470
Membership Fees for Clubs (2)	81	$134.46	$6,322,013
Fees for Participant Sports, excl. Trips	82	$93.35	$4,389,209
Admission to Movie/Theatre/Opera/Ballet	76	$113.23	$5,323,820
Admission to Sporting Events, excl. Trips	79	$48.49	$2,279,819
Fees for Recreational Lessons	82	$104.19	$4,898,943
Dating Services	78	$0.46	$21,666
TV/Video/Sound Equipment	84	$1,206.00	$56,704,696
Community Antenna or Cable TV	88	$651.18	$30,617,641
Televisions	78	$229.24	$10,778,476
VCRs, Video Cameras, and DVD Players	89	$29.63	$1,392,948
Video Cassettes and DVDs	83	$54.53	$2,563,729
Video Game Hardware and Software	85	$30.48	$1,433,290
Satellite Dishes	103	$1.14	$53,377
Rental of Video Cassettes and DVDs	82	$41.64	$1,957,868
Streaming/Downloaded Video	73	$0.59	$27,749
Sound Equipment (3)	77	$162.88	$7,658,636
Rental and Repair of TV/Radio/Sound Equipme	81	$4.70	$220,982
Pets	96	$424.35	$19,952,515
Toys and Games	86	$127.80	$6,008,816
Recreational Vehicles and Fees (4)	102	$445.70	$20,956,463
Sports/Recreation/Exercise Equipment (5)	82	$177.89	$8,364,202
Photo Equipment and Supplies (6)	88	$111.43	$5,239,249
Reading (7)	89	$254.56	$11,968,996
Food	86	$7,123.35	$334,932,801
Food at Home	86	$4,219.05	$198,375,297
Bakery and Cereal Products	88	$590.42	$27,761,131
Meat, Poultry, Fish, and Eggs	86	$1,055.20	$49,614,322
Dairy Products	87	$486.12	$22,856,926
Fruit and Vegetables	83	$690.63	$32,472,563
Snacks and Other Food at Home (8)	87	$1,396.68	$65,670,355
Food Away from Home	85	$2,904.30	$136,557,504
Alcoholic Beverages	80	$478.87	$22,515,816
Nonalcoholic Beverages at Home	88	$386.39	$18,167,774

Source: ESRI

Retail Gap Analysis: Existing Retail and Market Opportunities

Tables 5 and 6 highlight existing and potential retail spending within Harbor Town's PETA and SETA. Overall, these areas both have a greater demand for retail than they currently supply which suggests the potential to add new stores within these trade areas. According to ESRI estimates, total retail and food sales within the area delineated by the PETA amount to about $600 million per year. However, based on the population and income within this area, the total retail demand is estimated at about $900 million. In the SETA, total retail sales are approximately $900 million and total demand is estimated at $1.2 billion. This substantial gap between the sales generated within the PETA and SETA and the expected sales given the demographics indicates a high degree of retail "leakage" and the potential to add new stores.

Although retail demand exceeds the current supply in total, sharpening the focus to examine retail sales versus demand for specific retail categories reveals that there are specific sectors in which the Harbor Town PETA and SETA produce more sales than the resident customer base would be expected to generate. Within the PETA, building materials stores, specialty food stores, and gas stations are estimated to generate sales beyond what the local population within the area produces. In the SETA, only gas stations meet this benchmark. The "Leakage Surplus Factor" provides a measure of the difference between retail supply and demand in the trade areas. The higher the leakage surplus factor, the more sales are going to other areas. For example, with surplus factors over 50, retail sectors like clothing, books, electronics, and furniture are very high in the PETA indicating potential demand for additional stores in these categories.

The fact that retail sales within Harbor Town's trade areas are relatively low given the customer base within the two areas can be interpreted in a number of ways. On one hand, it indicates that people in these areas are traveling outside the area to shop and the trade areas are "leaking" sales to other competing retail areas. On the other hand, it indicates that there may be opportunities for Harbor Town to capture additional retail activity if new stores are opened. It is also important to note the data used to analyze sales in this area is based on 2008 information, the most current data available, and may not reflect market changes during 2008 and into 2009. New, recent store openings may affect whether particular retail sectors continue to have excess demand.

Table 5: Harbor Town PETA Retail Spending and Gap Analysis

Summary Demographics	
2008 Population	86,244
2008 Households	35,061
2008 Median Disposable Income	$41,219
2008 Per Capita Income	$25,793

Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$885,815,862	$593,789,910	**$292,025,952**	**19.7**	634
Total Retail Trade (NAICS 44-45)	$766,687,385	$524,381,306	**$242,306,079**	**18.8**	426
Total Food & Drink (NAICS 722)	$119,128,477	$69,408,604	**$49,719,873**	**26.4**	208

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$191,890,586	$73,205,197	**$118,685,389**	**44.8**	57
Automobile Dealers (NAICS 4411)	$161,132,144	$54,923,056	**$106,209,088**	**49.2**	24
Other Motor Vehicle Dealers (NAICS 4412)	$19,502,048	$12,415,423	**$7,086,625**	**22.2**	15
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$11,256,394	$5,866,718	**$5,389,676**	**31.5**	18
Furniture & Home Furnishings Stores (NAICS 442)	$21,108,154	$6,154,839	**$14,953,315**	**54.8**	20
Furniture Stores (NAICS 4421)	$12,436,782	$2,905,938	**$9,530,844**	**62.1**	6
Home Furnishings Stores (NAICS 4422)	$8,671,372	$3,248,901	**$5,422,471**	**45.5**	14
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$27,108,669	$6,877,479	**$20,231,190**	**59.5**	25
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$23,821,105	$31,811,346	**-$7,990,241**	**-14.4**	48
Building Material and Supplies Dealers (NAICS 4441)	$20,741,961	$30,692,454	**-$9,950,493**	**-19.3**	36
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$3,079,144	$1,118,892	**$1,960,252**	**46.7**	12
Food & Beverage Stores (NAICS 445)	$172,879,373	$145,854,586	**$27,024,787**	**8.5**	44
Grocery Stores (NAICS 4451)	$164,796,070	$139,755,513	**$25,040,557**	**8.2**	22
Specialty Food Stores (NAICS 4452)	$3,911,355	$4,434,367	**-$523,012**	**-6.3**	17
Beer, Wine, and Liquor Stores (NAICS 4453)	$4,171,948	$1,664,706	**$2,507,242**	**43.0**	5
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$27,658,734	$22,558,913	**$5,099,821**	**10.2**	27
Gasoline Stations (NAICS 447/NAICS 4471)	$125,310,450	$168,502,903	**-$43,192,453**	**-14.7**	35
Clothing and Clothing Accessories Stores (NAICS 448)	$23,102,965	$4,014,501	**$19,088,464**	**70.4**	16
Clothing Stores (NAICS 4481)	$14,350,960	$1,642,697	**$12,708,263**	**79.5**	7
Shoe Stores (NAICS 4482)	$4,165,633	$1,160,646	**$3,004,987**	**56.4**	3
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$4,586,372	$1,211,158	**$3,375,214**	**58.2**	6
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$13,052,762	$4,129,772	**$8,922,990**	**51.9**	33
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$8,077,866	$2,771,409	**$5,306,457**	**48.9**	25
Book, Periodical, and Music Stores (NAICS 4512)	$4,974,896	$1,358,363	**$3,616,533**	**57.1**	8

Source: ESRI

Table 6: Harbor Town SETA Retail Spending and Gap Analysis

Harbor Town Secondary Trade Area					
Summary Demographics					
2008 Population	115,813				
2008 Households	47,019				
2008 Median Disposable Income	$40,677				
2008 Per Capita Income	$25,398				
Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$1,179,590,356	$924,679,128	**$254,911,228**	**12.1**	908
Total Retail Trade (NAICS 44-45)	$1,021,681,330	$828,314,093	**$193,367,237**	**10.5**	594
Total Food & Drink (NAICS 722)	$157,909,026	$96,365,035	**$61,543,991**	**24.2**	314
Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$257,548,681	$133,024,492	**$124,524,189**	**31.9**	83
Automobile Dealers (NAICS 4411)	$215,936,428	$109,090,492	**$106,845,936**	**32.9**	39
Other Motor Vehicle Dealers (NAICS 4412)	$26,413,192	$15,072,510	**$11,340,682**	**27.3**	20
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$15,199,061	$8,861,490	**$6,337,571**	**26.3**	24
Furniture & Home Furnishings Stores (NAICS 442)	$27,080,761	$8,920,222	**$18,160,539**	**50.4**	27
Furniture Stores (NAICS 4421)	$16,784,558	$4,830,961	**$11,953,597**	**55.3**	8
Home Furnishings Stores (NAICS 4422)	$10,296,203	$4,089,261	**$6,206,942**	**43.1**	19
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$34,255,554	$10,737,861	**$23,517,693**	**52.3**	36
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$32,297,236	$37,379,472	**-$5,082,236**	**-7.3**	66
Building Material and Supplies Dealers (NAICS 4441)	$28,378,758	$35,775,202	**-$7,396,444**	**-11.5**	49
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$3,918,478	$1,604,270	**$2,314,208**	**41.9**	17
Food & Beverage Stores (NAICS 445)	$224,359,718	$194,363,656	**$29,996,062**	**7.2**	64
Grocery Stores (NAICS 4451)	$210,468,486	$183,584,170	**$26,884,316**	**6.8**	30
Specialty Food Stores (NAICS 4452)	$9,142,994	$8,910,535	**$232,459**	**1.3**	28
Beer, Wine, and Liquor Stores (NAICS 4453)	$4,748,238	$1,868,951	**$2,879,287**	**43.5**	6
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$35,073,878	$26,614,400	**$8,459,478**	**13.7**	33
Gasoline Stations (NAICS 447/NAICS 4471)	$168,944,018	$251,740,926	**-$82,796,908**	**-19.7**	56
Clothing and Clothing Accessories Stores (NAICS 448)	$28,528,479	$4,722,523	**$23,805,956**	**71.6**	19
Clothing Stores (NAICS 4481)	$17,492,752	$2,019,427	**$15,473,325**	**79.3**	9
Shoe Stores (NAICS 4482)	$5,306,000	$1,160,646	**$4,145,354**	**64.1**	3
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$5,729,727	$1,542,450	**$4,187,277**	**57.6**	7
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$15,148,810	$4,964,688	**$10,184,122**	**50.6**	40
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$9,522,354	$3,550,294	**$5,972,060**	**45.7**	31
Book, Periodical, and Music Stores (NAICS 4512)	$5,626,456	$1,414,394	**$4,212,062**	**59.8**	9

Source: ESRI

Key Harbor Town Traffic Count Data

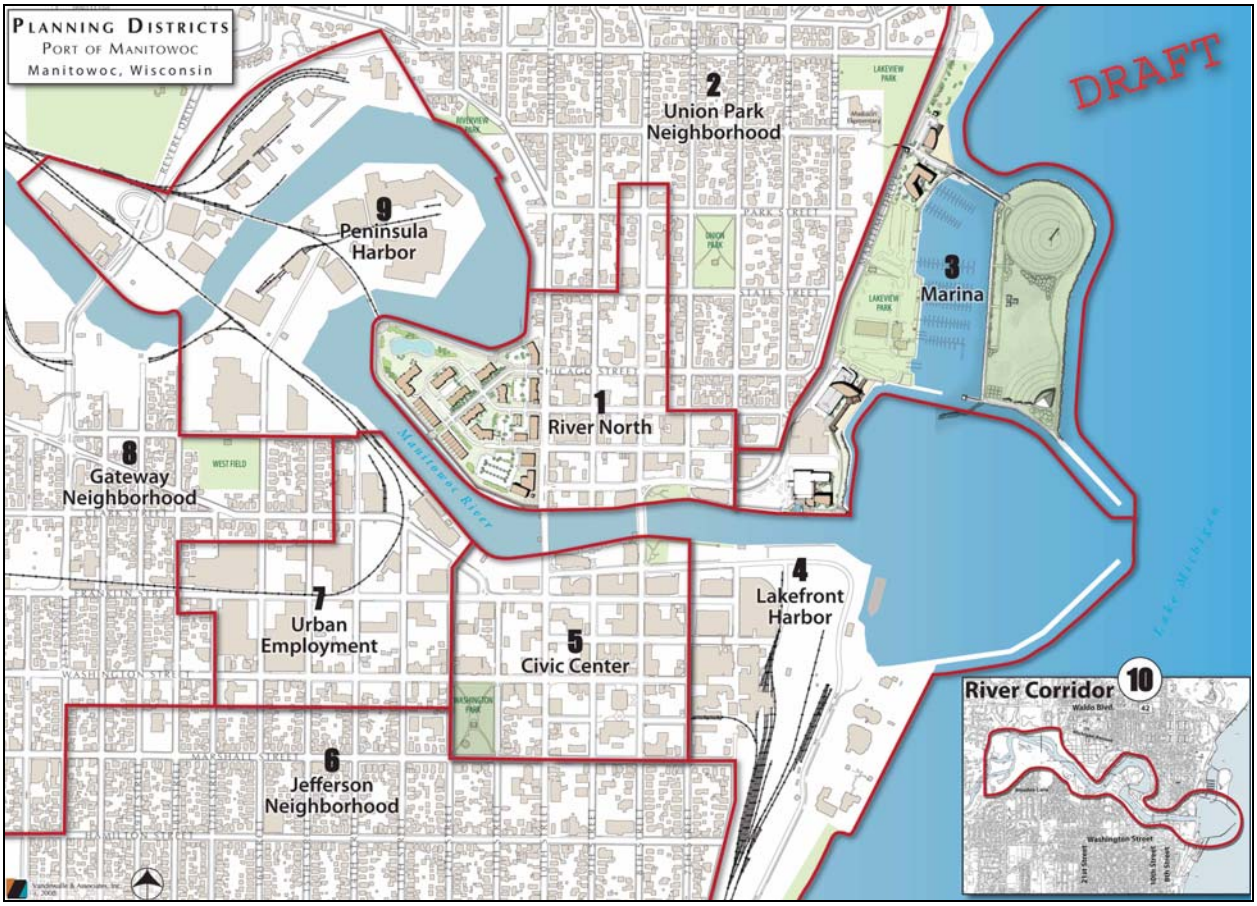
Traffic counts are a key indicator of retail potential. Locations on key transportation corridors that carry high volumes of traffic are more visible to potential customers and typically more convenient to access, and therefore considered to be higher-value retail locations. The site selection processes for national retail chains often set traffic count benchmarks that must be met before a site is even considered for a new store.

Located at the intersection of two primary highways, the Harbor Town area has a key advantage over other parts of the City in terms of traffic counts. According to 2005 data from the State DOT, the section of Interstate 43 that crosses Highway 151 carries about 21,000 cars per day. The section of Highway 151 just west of intersection carries about 13,000 daily cars and the section just east of the Interstate carries about 16,000 cars. No other intersection in the County has as a high a total traffic volume as this intersection.

Downtown Manitowoc Market Analysis

Downtown Manitowoc's market position has changed over the last several decades and will continue to evolve as the City moves into the future. According to the City's 1999 Comprehensive Plan, the 80's and 90's saw the downtown transition from a primary commercial area to a more specialized retail and service district. The intervening years since the 1999 plan have seen downtown Manitowoc continue to evolve and its function and position in the regional economy will see additional changes as out-dated business models decline and new opportunities emerge. In order to help guide the 2008 Comprehensive Planning process and gain a greater understanding of downtown Manitowoc's current economic conditions, this market overview and economic profile examines a few key indicators that provide insight into current market conditions and trends in the downtown, as well as the City and region. Map 2 indicates the downtown area planned for in the Port of Manitowoc Downtown & River Corridor Master Plan, Special Study Area in the 2009 Comprehensive Plan update process. As the map indicates, this area extends beyond the boundaries of the Main Street district and is significantly larger than the area typically thought of as the "downtown."

Map 2: Downtown Planning Districts



Downtown Regional Position

Downtown Manitowoc is the geographic and symbolic center of the City and the center of Manitowoc County as the county seat. The market potential for residential, retail, and office development in downtown Manitowoc is largely driven by conditions and trends that stretch well beyond the boundaries of downtown and the City limits. Therefore, this analysis looks at indicators within several larger areas including jurisdictional boundaries (City and County), as well as non-jurisdictional areas delineated by several radius rings. Because of Manitowoc's lakefront location and asymmetrical transportation accessibility (with stronger access to the north and south and weaker access to the west) the analysis also looks at areas defined by drive time distances from downtown.

Figure 4: Downtown and Regional Demographic Overview

- **Downtown Manitowoc**
  - Population: 4,600
  - Median Income:$41,000
  - Median Age: 32
- **City of Manitowoc**
  - Population: 34,000
  - Median Income:$48,000
  - Median Age: 40.5
- **25-Mile Radius**
  - Population: 157,000
  - Median Income: $53,500
  - Median Age: 39
- **50-Mile Radius**
  - Population: 881,000
  - Median Income:$58,000
  - Median Age: 37
- **1-Hour Drive Time**
  - Population: 530,000
  - Median Income:$57,000
  - Median Age: 37

Source: ESRI Business Solutions 2008

Key Demographic and Housing Indicators

Manitowoc is a stable community that is seeing modest growth but is maintaining its population base. Manitowoc's city-wide and downtown residents tend to have lower incomes and live in smaller, older homes. Overall, the limited population growth; lower incomes; and older, smaller homes and households in Manitowoc and downtown Manitowoc compared to the larger area simply reflect the fact that Manitowoc is the historic core of the region and has a more established, economically diverse population than neighboring, more recently developed, areas.

Reflecting nationwide trends, Manitowoc, and the region overall, are seeing an increase in older age brackets. For at least the next decade, the number of people entering the workforce, both native and immigrant, is likely to climb more slowly than the number of jobs needing to be filled. This shift mirrors the well-documented nationwide phenomenon of the aging Baby Boom generation transitioning from working and raising a family to the empty-nest, retirement lifestyle.

Manitowoc's changing age profile may have important implications for downtown and the City as a whole. The fact that most near-term growth in the community is expected in older households is likely to profoundly affect housing demand in Manitowoc. The boomer and young adult markets typically consist of smaller, one- or two-person households and are more likely to select smaller housing units in more urban, amenity-rich neighborhoods. This changing demand may open up new opportunities for downtown housing in Manitowoc to cater to these growing market segments that often prefer a full-service, downtown atmosphere. More detailed recommendations for downtown are found in the Port of Manitowoc Downtown & River Corridor Master Plan.

Key Findings from 1993 Mary Means Revitalization Strategy

Reviewing the Market Analysis component of the 1993 Downtown Manitowoc Revitalization Strategy provides some insight into the path the downtown has taken as a retail center over the last decade plus. Based on an analysis of the total sales within the downtown in comparison to the total quantity of retail space, this report estimated that total square footage of retail in the downtown exceeded the square footage that would be justifiable given total sales. The oversupply of retail space given sales volumes that was seen in 1993 likely contributed to low per-store sales volumes and a lack of new stores entering the market. With few new stores opening and creating freshness and new shopping opportunities, the downtown retail market softened in the intervening years. The challenge going forward is to reignite downtown Manitowoc's retail position by attracting new retail activity that will draw additional consumers into the area, supporting both new and existing stores and restaurants.

Key Manitowoc Community Survey Results

As part of the 2008-09 Comprehensive Planning process, the City of Manitowoc conducted a detailed community survey as one of the tools used to gather input from residents. The City received almost 3,000 survey responses and several of the questions are directly related to the downtown and the downtown's existing and potential retail market. The key findings from the survey that provide insight into the community's views and goals for downtown include:

- Eighty-five percent of respondents indicated that "shopping opportunities" are either a high priority or a medium priority. Clearly, the city's residents want to see more retail establishments in the community and, as the central shopping area, some of this new retail activity should be located in the downtown.
- When given a list of potential City initiatives and asked to rate their priority, "Promote more retail development in the Downtown" was ranked highest with over 50% of respondents indicating that they view this as a high priority. The public in Manitowoc wants to see new retail development in their downtown.
- When asked how frequently they shop, transact business, or do other activities in the downtown, the most common answer given by respondents was "almost never." When taken in combination with the previously noted question in which respondents viewed more downtown retail as a key priority, it appears that Manitowoc residents want to be downtown and shop downtown, but the current retail offerings are simply not meeting their needs.
- When asked what activities they would be likely to do, if available, in the downtown area, 73% of respondents checked "shop" and 80% checked "restaurants/dining." These two activities were the highest ranked of the activities listed in the question. Again, it seems that Manitowoc's residents want to have more reasons to go downtown and are willing and interested in going downtown to shop and eat, but need more options.

Key Market Information from Manitowoc's Main Street Application

In 2008, Mainly Manitowoc completed an extensive application required to be considered for Main Street District designation. The research that was done to complete the application and much of the information that is included provides valuable insight into current market conditions in downtown Manitowoc, particularly related to retail position and potential. Some of the most relevant findings in the application include:

- There are 186 businesses in the downtown supporting approximately 1,600 full time jobs.
- Manitowoc's Main Street district is a 34-block area that primarily consists of retail and service space. However, the area also includes 162 residential units, some manufacturing facilities, and about 250,000 square feet of vacant first and second floor space.
- The information in the application indicates that there is about 355,000 square feet of retail and restaurant/tavern space in the downtown, including 3 grocery stores, 20 restaurants, 14 taverns, 2 drug stores, 31 specialty shops, and a number of additional retail establishments.
- As of the time the application was completed, there were 45 vacant first floor storefronts representing 11% of the total square footage in the downtown.

This information is useful in understanding the availability of retail space in the downtown and the existing mix of businesses. The data supports the notion that downtown Manitowoc's retail market is primarily geared toward smaller-scale, specialty stores. The information also highlights the fact that there is a significant amount of vacant space in the downtown, which can potentially be positioned to provide new business opportunities in retail sectors not currently present in the downtown.

Retail Market Position

Figure 5: Citywide and Downtown Retail Market Overview

- The Downtown Manitowoc area sees about $90 million in retail and food and beverage sales per year and the City sees $413 million in annual sales.
- The Downtown Manitowoc area has only about 22% of all retail sales in the City but over 40% of all retail establishments.
- The average sales per store downtown is $680,000. In comparison, the average per store for the City as a whole is $1.3 million.
- Downtown's mix of retail favors home furnishings, food, healthcare stores, and gas stations but is lacking in clothing and furniture.
- The City of Manitowoc has 34% of the County's total population but accounts for 60% of all retail sales in the County.

Source: ESRI Business Solutions 2008

According to 2007 estimated retail sales data, the City of Manitowoc is a retail hub for the County that attracts shoppers from outside the boundaries of the City limits. The City generates about $413 million in annual retail and food and beverage sales but the local population alone is responsible for only about $342 million (83%) of that total with the rest coming from people who live outside the City. Given Manitowoc's central position and role as an urban center of central Wisconsin's eastern shore, the community has the potential to serve as a retail destination attracting shoppers from throughout the region. In general, Manitowoc's retail strength does not carry across all sectors. Furniture, clothing, and electronics are sectors in which the City is "leaking" sales to other parts of the region, which possibly indicates the potential to add stores to capture this gap. A new 69,000-square foot Kohl's Department Store in Harbor Town should help keep clothing expenditures local.

Similar to the city-wide retail performance, the downtown area is very strong in some sectors but weak in others. The closing of Cook's Corner in 2007 negatively impacted the downtown. Cook's Corner was a key anchor that attracted approximately 70,000 customers per year and the downtown, currently does not have any equivalent anchor destination store to help attract new shoppers to the downtown. At the same time however, the downtown does support a large number of retail establishments and generates significant sales activity.

Moving forward, in spite of newer, auto-oriented commercial development near Interstate 43, downtown should be able to grow a relatively strong (albeit more specialized) retail base. The current mix of shopping opportunities and the quality of the retail experience offered in downtown Manitowoc are not fully leveraging the area's potential. Downtown Manitowoc's retail position could be enhanced with new specialty stores, restaurants, and services along with a more coherent retailing concept and a coordinated retail strategy that integrates a unique business mix, a historic setting, and a pleasant public realm to create a positive downtown experience. Currently, the key weakness of the downtown's retail position is that it does not have enough stores to create a critical mass of shopping interest, however, current vacancies in retail buildings and gaps in the existing or "built" fabric of the downtown offer opportunities to locate new types of businesses in this area.

It is unlikely that in the future the downtown will be able to attract a large, anchor retailer such as a major department store, or an equivalent to Cook's Corner. In today's marketplace, these types of uses are simply unlikely to choose downtown locations. However, focusing on downtown Manitowoc's assets (its lakefront, riverfront, unique attractions and activities, etc.) can help build the critical mass of activity needed to support a strong retail, residential, entertainment, and dining district.

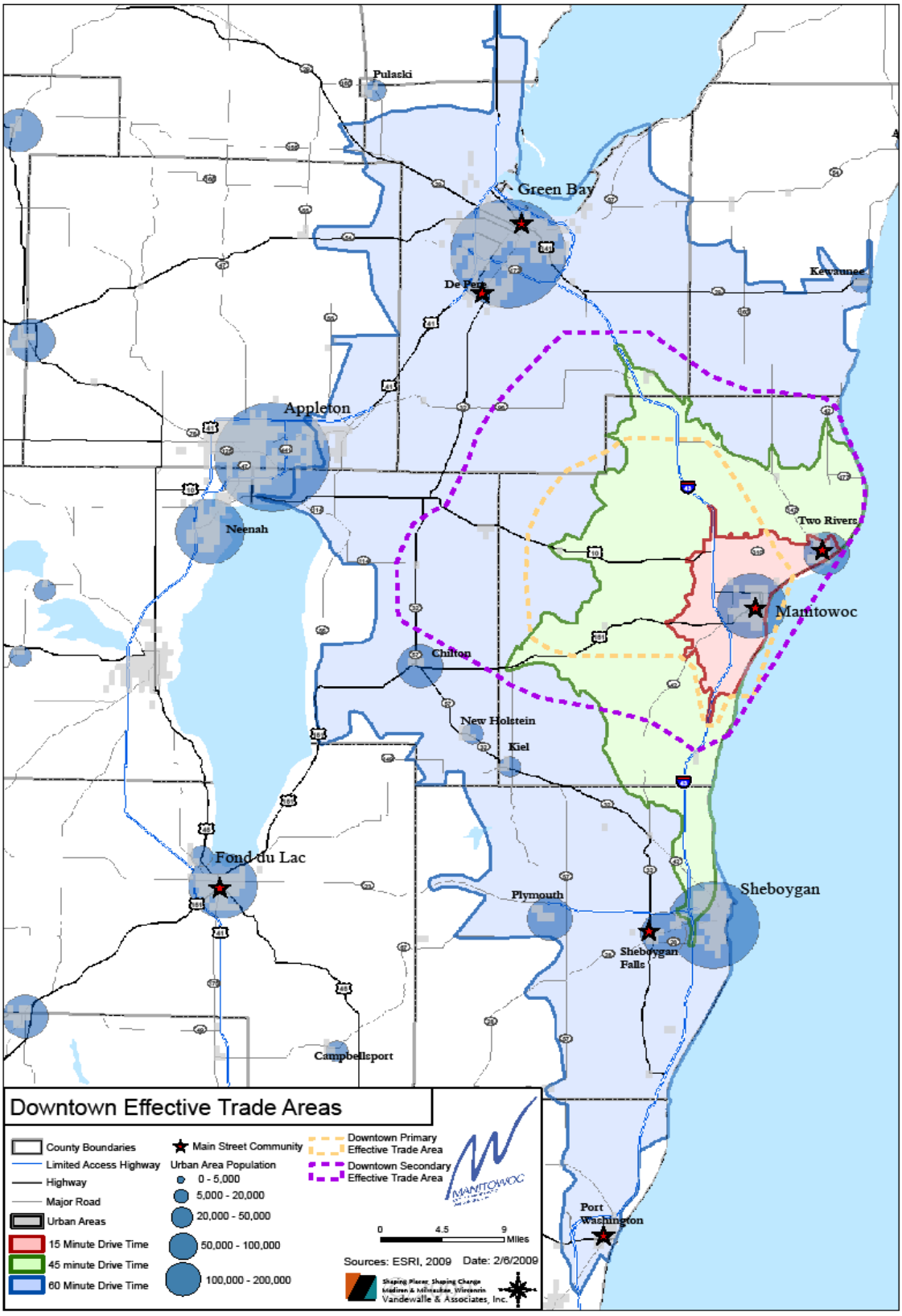
Trade Area Delineation

The methodology for defining a PETA and SETA for downtown Manitowoc was similar to the methodology used for Harbor Town, in that they both primarily rely on looking at competing areas in the region combined with a drive time analysis. However, because downtown areas typically offer a different type of retail experience than big box districts, the trade area is defined somewhat differently.

The market pull of a downtown shopping district is typically a function of the size of the community or urban area in which a downtown is located. Larger communities generally have larger downtowns with a greater mix of retail, dining, and entertainment offerings. So, a potential customer who is interested in a downtown a shopping experience will typically base their shopping decision on the drive time distance to competing downtowns and the size of the community.

The following map highlights drive time information, and shows potentially competitive downtown areas based on the size of other communities in the region. Based on this analysis, the map highlights the PETA and SETA for downtown Manitowoc.

Map 3: Downtown Trade Area Map



Trade Area Consumer Profile and Spending Patterns

The following two tables (Tables 7 and 8) show demographic and consumer habits of residents of the downtown's PETA and SETA. The PETA has a 2008 population of approximately 51,000 people with 21,000 households. The area is projected to add about 350 residents and 400 households between 2008 and 2013. The SETA has a 2008 population of about 90,000 with 37,000 households. Both areas have median household incomes of about $55,000 per year which is similar to statewide benchmarks and both areas have somewhat older populations.

The top tapestry segments in both the PETA and SETA are "Salt of the Earth" (23%), "Green Acres" (18%), "Rustbelt Retirees" (14%), "Rustbelt Traditions" (12%), and "Simple Living" (10%) (see Figure 3 for descriptions of the characteristics of these segments). Similar to the Harbor Town trade areas, the residents of the downtown trade areas typically spend significantly less on consumer goods than average U.S. households. The spending potential index for both the downtown's PETA and SETA is below average in all retail categories.

Table 7: Downtown PETA Demographics and Spending Behavior

Retail Goods and Services

Downtown Primary Trade Area

Top Tapestry Segments:		Demographic Summary	2008	2013
Salt of the Earth	23.3%	Population	51,235	51,598
Green Acres	17.6%	Households	21,173	21,539
Rustbelt Retirees	13.9%	Families	13,968	14,085
Rustbelt Traditions	12.4%	Median Age	40.8	42.1
Simple Living	10.1%	Median Household Income	$52,409	$61,032

	Spending Potential Index	Average Amount Spent	Total
Apparel and Services	70	$1,866.87	$39,527,263
Men's	70	$346.41	$7,334,503
Women's	67	$634.01	$13,423,815
Children's	78	$323.66	$6,852,762
Footwear	56	$272.35	$5,766,383
Watches & Jewelry	81	$180.72	$3,826,431
Apparel Products and Services (1)	87	$109.73	$2,323,369
Computer			
Computers and Hardware for Home Use	81	$170.39	$3,607,600
Software and Accessories for Home Use	78	$22.63	$479,194
Entertainment & Recreation	86	$3,184.31	$67,421,402
Fees and Admissions	82	$504.73	$10,686,577
Membership Fees for Clubs (2)	82	$136.99	$2,900,405
Fees for Participant Sports, excl. Trips	84	$95.85	$2,029,363
Admission to Movie/Theatre/Opera/Ballet	79	$117.20	$2,481,555
Admission to Sporting Events, excl. Trips	80	$48.92	$1,035,841
Fees for Recreational Lessons	83	$105.33	$2,230,051
Dating Services	75	$0.44	$9,362
TV/Video/Sound Equipment	84	$1,210.73	$25,634,827
Community Antenna or Cable TV	88	$648.58	$13,732,464
Televisions	79	$233.57	$4,945,378
VCRs, Video Cameras, and DVD Players	88	$29.38	$622,108
Video Cassettes and DVDs	83	$54.58	$1,155,554
Video Game Hardware and Software	85	$30.59	$647,721
Satellite Dishes	95	$1.06	$22,409
Rental of Video Cassettes and DVDs	83	$41.99	$889,010
Streaming/Downloaded Video	77	$0.62	$13,045
Sound Equipment (3)	78	$165.53	$3,504,786
Rental and Repair of TV/Radio/Sound Equipme	83	$4.83	$102,352
Pets	92	$407.14	$8,620,374
Toys and Games	85	$126.50	$2,678,322
Recreational Vehicles and Fees (4)	91	$400.09	$8,471,138
Sports/Recreation/Exercise Equipment (5)	80	$171.71	$3,635,618
Photo Equipment and Supplies (6)	86	$109.04	$2,308,799
Reading (7)	88	$254.37	$5,385,747
Food	85	$7,094.13	$150,203,967
Food at Home	86	$4,189.90	$88,712,851
Bakery and Cereal Products	87	$585.78	$12,402,806
Meat, Poultry, Fish, and Eggs	85	$1,046.50	$22,157,563
Dairy Products	86	$481.20	$10,188,518
Fruit and Vegetables	84	$694.20	$14,698,284
Snacks and Other Food at Home (8)	86	$1,382.22	$29,265,680
Food Away from Home	85	$2,904.22	$61,491,116
Alcoholic Beverages	83	$492.26	$10,422,563
Nonalcoholic Beverages at Home	86	$380.00	$8,045,638

Source: ESRI

Table 8: Downtown SETA Demographics and Spending Behavior

Retail Goods and Services

Downtown Secondary Trade Area

Top Tapestry Segments:		**Demographic Summary**	**2008**	**2013**
Salt of the Earth	28.5%	Population	89,067	90,244
Rustbelt Traditions	18.4%	Households	36,144	37,011
Green Acres	17.2%	Families	24,649	25,027
Rustbelt Retirees	11.2%	Median Age	40.3	41.6
Simple Living	5.9%	Median Household Income	$53,855	$62,255

	Spending Potential Index	**Average Amount Spent**	**Total**
Apparel and Services	70	$1,884.40	$68,109,650
Men's	70	$349.39	$12,628,315
Women's	68	$639.45	$23,112,321
Children's	79	$328.41	$11,870,104
Footwear	57	$274.11	$9,907,441
Watches & Jewelry	83	$184.25	$6,659,642
Apparel Products and Services (1)	86	$108.78	$3,931,827
Computer			
Computers and Hardware for Home Use	82	$171.54	$6,200,234
Software and Accessories for Home Use	79	$22.72	$821,264
Entertainment & Recreation	88	$3,255.30	$117,659,570
Fees and Admissions	82	$509.45	$18,413,511
Membership Fees for Clubs (2)	83	$138.25	$4,997,077
Fees for Participant Sports, excl. Trips	85	$96.80	$3,498,650
Admission to Movie/Theatre/Opera/Ballet	78	$117.05	$4,230,595
Admission to Sporting Events, excl. Trips	81	$49.72	$1,797,198
Fees for Recreational Lessons	84	$107.17	$3,873,440
Dating Services	78	$0.46	$16,551
TV/Video/Sound Equipment	85	$1,221.31	$44,143,208
Community Antenna or Cable TV	89	$655.37	$23,687,665
Televisions	80	$234.67	$8,482,015
VCRs, Video Cameras, and DVD Players	90	$29.94	$1,082,180
Video Cassettes and DVDs	84	$55.12	$1,992,113
Video Game Hardware and Software	86	$30.93	$1,117,904
Satellite Dishes	99	$1.10	$39,849
Rental of Video Cassettes and DVDs	83	$42.22	$1,526,074
Streaming/Downloaded Video	77	$0.62	$22,260
Sound Equipment (3)	78	$166.54	$6,019,573
Rental and Repair of TV/Radio/Sound Equipme	82	$4.80	$173,575
Pets	95	$420.80	$15,209,518
Toys and Games	86	$128.82	$4,656,025
Recreational Vehicles and Fees (4)	98	$427.97	$15,468,467
Sports/Recreation/Exercise Equipment (5)	82	$177.17	$6,403,475
Photo Equipment and Supplies (6)	88	$112.01	$4,048,661
Reading (7)	90	$257.77	$9,316,705
Food	86	$7,187.64	$259,789,937
Food at Home	87	$4,247.54	$153,523,174
Bakery and Cereal Products	88	$594.11	$21,473,637
Meat, Poultry, Fish, and Eggs	87	$1,060.64	$38,335,814
Dairy Products	88	$488.67	$17,662,455
Fruit and Vegetables	84	$699.60	$25,286,437
Snacks and Other Food at Home (8)	88	$1,404.52	$50,764,831
Food Away from Home	86	$2,940.09	$106,266,763
Alcoholic Beverages	83	$491.83	$17,776,601
Nonalcoholic Beverages at Home	88	$386.89	$13,983,644

Source: ESRI

Retail Gap Analysis: Existing Retail and Market Opportunities

Tables 9 and 10 provide an overview of existing retail spending (supply) and projected retail opportunities (demand) within the PETA and the SETA. Both areas currently produce more demand than they currently supply indicating the potential to add new retail establishments to the trade areas. The data on retail industry groups indicates specific retail sectors with current gaps between existing supply and potential consumer demand.

Stores for building materials and gas stations are the only retail categories in the downtown PETA and SETA that generate sales beyond what the local population would be expected to generate. This indicates that there is unmet demand for a variety of types of retail within these areas.

Table 9: Downtown PETA Retail Spending and Gap Analysis

Downtown Primary Trade Area					
Summary Demographics					
2008 Population	51,235				
2008 Households	21,173				
2008 Median Disposable Income	$40,032				
2008 Per Capita Income	$25,779				
Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$522,321,138	$426,387,862	**$95,933,276**	**10.1**	411
Total Retail Trade (NAICS 44-45)	$451,686,563	$375,662,381	**$76,024,182**	**9.2**	277
Total Food & Drink (NAICS 722)	$70,634,575	$50,725,481	**$19,909,094**	**16.4**	134
Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$112,275,223	$51,362,180	**$60,913,043**	**37.2**	33
Automobile Dealers (NAICS 4411)	$94,455,980	$40,158,654	**$54,297,326**	**40.3**	13
Other Motor Vehicle Dealers (NAICS 4412)	$11,218,529	$7,634,595	**$3,583,934**	**19.0**	9
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$6,600,714	$3,568,931	**$3,031,783**	**29.8**	11
Furniture & Home Furnishings Stores (NAICS 442)	$12,603,739	$4,811,002	**$7,792,737**	**44.7**	13
Furniture Stores (NAICS 4421)	$7,314,824	$2,530,384	**$4,784,440**	**48.6**	5
Home Furnishings Stores (NAICS 4422)	$5,288,915	$2,280,618	**$3,008,297**	**39.7**	8
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$16,365,085	$4,735,329	**$11,629,756**	**55.1**	17
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$13,788,840	$28,038,994	**-$14,250,154**	**-34.1**	28
Building Material and Supplies Dealers (NAICS 4441)	$11,980,298	$27,824,587	**-$15,844,289**	**-39.8**	24
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,808,542	$214,407	**$1,594,135**	**78.8**	4
Food & Beverage Stores (NAICS 445)	$102,986,371	$99,513,383	**$3,472,988**	**1.7**	27
Grocery Stores (NAICS 4451)	$98,493,318	$96,523,045	**$1,970,273**	**1.0**	13
Specialty Food Stores (NAICS 4452)	$1,909,971	$1,525,397	**$384,574**	**11.2**	10
Beer, Wine, and Liquor Stores (NAICS 4453)	$2,583,082	$1,464,941	**$1,118,141**	**27.6**	4
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$16,650,478	$14,227,503	**$2,422,975**	**7.8**	19
Gasoline Stations (NAICS 447/NAICS 4471)	$73,583,532	$119,312,490	**-$45,728,958**	**-23.7**	23
Clothing and Clothing Accessories Stores (NAICS 448)	$13,994,065	$3,325,206	**$10,668,859**	**61.6**	12
Clothing Stores (NAICS 4481)	$8,762,129	$1,326,066	**$7,436,063**	**73.7**	5
Shoe Stores (NAICS 4482)	$2,482,252	$1,160,646	**$1,321,606**	**36.3**	3
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$2,749,684	$838,494	**$1,911,190**	**53.3**	4
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$8,027,692	$2,520,667	**$5,507,025**	**52.2**	25
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$4,927,746	$1,552,638	**$3,375,108**	**52.1**	18
Book, Periodical, and Music Stores (NAICS 4512)	$3,099,946	$968,029	**$2,131,917**	**52.4**	7

Source: ESRI

Table 10: Downtown SETA Retail Spending and Gap Analysis

Downtown Secondary Trade Area					
Summary Demographics					
2008 Population	89,067				
2008 Households	36,144				
2008 Median Disposable Income	$40,997				
2008 Per Capita Income	$25,637				
Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$910,054,185	$649,314,785	**$260,739,400**	**16.7**	675
Total Retail Trade (NAICS 44-45)	$787,112,892	$572,057,708	**$215,055,184**	**15.8**	444
Total Food & Drink (NAICS 722)	$122,941,293	$77,257,077	**$45,684,216**	**22.8**	231
Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$197,175,286	$92,659,472	**$104,515,814**	**36.1**	62
Automobile Dealers (NAICS 4411)	$165,648,904	$74,181,167	**$91,467,737**	**38.1**	29
Other Motor Vehicle Dealers (NAICS 4412)	$19,923,648	$12,572,180	**$7,351,468**	**22.6**	15
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$11,602,734	$5,906,125	**$5,696,609**	**32.5**	18
Furniture & Home Furnishings Stores (NAICS 442)	$21,923,193	$6,109,337	**$15,813,856**	**56.4**	19
Furniture Stores (NAICS 4421)	$12,881,555	$2,930,762	**$9,950,793**	**62.9**	6
Home Furnishings Stores (NAICS 4422)	$9,041,638	$3,178,575	**$5,863,063**	**48.0**	13
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$27,398,414	$8,094,773	**$19,303,641**	**54.4**	26
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$25,022,320	$31,120,835	**-$6,098,515**	**-10.9**	46
Building Material and Supplies Dealers (NAICS 4441)	$21,744,829	$30,495,556	**-$8,750,727**	**-16.8**	37
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$3,277,491	$625,279	**$2,652,212**	**68.0**	9
Food & Beverage Stores (NAICS 445)	$176,519,371	$146,987,478	**$29,531,893**	**9.1**	46
Grocery Stores (NAICS 4451)	$168,306,937	$140,302,772	**$28,004,165**	**9.1**	20
Specialty Food Stores (NAICS 4452)	$3,841,120	$5,020,000	**-$1,178,880**	**-13.3**	21
Beer, Wine, and Liquor Stores (NAICS 4453)	$4,371,314	$1,664,706	**$2,706,608**	**44.8**	5
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$28,199,886	$23,076,024	**$5,123,862**	**10.0**	29
Gasoline Stations (NAICS 447/NAICS 4471)	$128,942,694	$191,461,090	**-$62,518,396**	**-19.5**	39
Clothing and Clothing Accessories Stores (NAICS 448)	$24,849,887	$4,014,501	**$20,835,386**	**72.2**	16
Clothing Stores (NAICS 4481)	$15,679,105	$1,642,697	**$14,036,408**	**81.0**	7
Shoe Stores (NAICS 4482)	$4,440,150	$1,160,646	**$3,279,504**	**58.6**	3
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$4,730,632	$1,211,158	**$3,519,474**	**59.2**	6
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$13,289,601	$4,198,122	**$9,091,479**	**52.0**	35
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$8,177,342	$2,839,759	**$5,337,583**	**48.4**	27
Book, Periodical, and Music Stores (NAICS 4512)	$5,112,259	$1,358,363	**$3,753,896**	**58.0**	8

Source: ESRI

Key Downtown Traffic Count Data

Because downtown is a different retail format, traffic count information is less relevant than in a highway-oriented commercial area like Harbor Town. However, the total volume of traffic still has relevance. Highway 151 where it enters downtown has an average daily traffic volume of 10,400 cars. The downtown's two north/south bridges crossing the river (8th Street and 10th Street) each carry about 13,000 average daily trips. Though low compared to major highways, these traffic volumes are relatively high for downtown commercial streets and indicate significant vehicle traffic in and through the downtown.

One-Way Street Conversion

In the 1950s and 60s, many communities converted their downtown streets to one-way pairs to help traffic move more efficiently based on traffic engineering recommendations. While one-way traffic *does* flow more easily and quickly, there are other considerations that, when combined, indicate one-way pairs may have negative impacts on the economic health of businesses and downtown districts, this has prompted many communities to pursue the conversion of their one-way pairs back to two-way streets. The following case review provides more information on the factors to examine when considering a conversion project from one- to two-way streets.

In summary, based on the direct experience of Vandewalle & Associates and the case study review, the following are key reasons for one-way street to two-way street conversion, particularly as it pertains to the success of downtown:

- **Traffic capacity and speed** tend to decrease with conversion, which results in increased congestion (though Level of Service remains acceptable) but also safer speeds. Communities researched indicated that the flow and speed of traffic were reduced, although marginal after conversion to two-way because the two-way routes were more direct. Communities also believed that this was a positive improvement as this change better balanced the purpose of the roadway system to serve both local and through traffic, and improved mobility for pedestrians, bicyclists, and transit users.
- **Directness of travel and wayfinding** increases with conversion. Communities found that the conversion from one-way pairs to two-way traffic resulted in less confusion for visitors not familiar with the area.
- **Economic vitality** is revitalized in downtown commercial districts with conversion. In most communities, there was a marked improvement in economic vitality. Communities surveyed found that after conversion vacancies dropped significantly, new development and redevelopment occurred and local businesses experienced increased sales. Reasons for this increased economic vitality were from improved access, improved distribution of traffic, and city capital investments in the local community.
- **On-street parking** may decrease in conversion, but it also may increase in conversion depending on the logistics of the existing rights-of-way.
- **Safety** is not a cut and dry issue; some conversions see an increase in traffic accidents while others see a decrease.
- **Pedestrian/bicycle experience** improves with conversion as traffic is "calmed" with two-way streets.
- **Congestion** is not likely a relevant result of one-way conversion. Communities researched indicated that prior to converting from one-way to two-way operations opponents of the conversion were fearful that the change would result in congestion through a less efficient roadway system. Following conversion, however congestion was not found to be increased, as increased opportunities for diversion occurred in the street network.
- **Repeat conversions** are common in communities that converted a pair. In research of many of the jurisdictions that had converted from one-way to two-way operations, it was

found that because of the success of the conversions, additional plans have been made to convert additional one-way streets within these communities to two-way operations.

- **Conversion is underway** across the country in small and large communities. Based on research, it was found that many communities throughout the United States are planning conversions from one-way to two-way operations. These include the cities of Austin, Berkeley, Cambridge, Chattanooga, Cincinnati, Louisville, Palo Alto, Sacramento, San Jose, Seattle, St. Petersburg, and Tampa. Wisconsin communities with successful conversions include: Sheboygan, Green Bay, Waukesha, Platteville, and Milwaukee to name just a few.

The following case studies have been provided to give a snapshot of the research conducted which contributed to the findings and recommendations above. It should be noted that the next first step for communities when considering one-way street conversion is a detailed engineering study to determine costs and logistics of the conversation.

Research Findings from the 2003 Illinois Highway 92 Corridor Study

LSA Associates, INC

City	Population	Average Daily Traffic	Results
Anniston, AL	24,600	10-15,000	Increased business traffic and accessibility vacancy rate dropped from 6% to 1%. "Everyone is happy, including the bank that was initially opposed to the change.
Buffalo, NY	328,000	6,800	Changed street has become entertainment center. Pedestrian traffic has increased significantly. Plans are to change more one-ways back to two-way.
Charleston, SC	95,000	--	Change was in a minority business corridor. Dramatic increase in new retail business activity. Some continued complaints on eliminated street parking.
Hickory, NC	36,000	5,000	Changed the City's image to "user-friendly." Can get around easier, people are happy. New stores have opened.
Lafayette, IN	50,000	12,000	Good results, better access. "No one would want to go back to one-way traffic."
Lubbock, TX	200,000	7,100	Improved access and clarity. New business development after 20 years of decline.
Mansfield, OH	51,000	--	Easier for visitors, increased development.
Moshpee, MD	9,000	--	After change, the study area has become considered as the most successful retail on the cape.
Milwaukee, WI	650,000	--	Very successful, more user-friendly, calmed traffic, and improved flow.
New Haven, CT	126,000	--	Positive results, visitors more comfortable, public wants more two-ways.
North Little Rock, AR	61,000	13,000	Vacancy dropped from 75% to 60% within first 18 months. Has attracted property investment and new development.
Sheridan, WY	14,000	--	Vacancy rate on the street has dropped from 25% to less than 1%. Vacant buildings purchased and redeveloped. Pedestrian traffic has increased significantly. Before and after survey indicate visitors find it easier to get around.
Toledo, OH	323,000	--	"The new two-way streets and pedestrian enhancements

			have totally turned our city around." Restaurants report 5-7% increase.
Wailuku, HI	14,000	--	Positive response. Tourists find traffic patterns less confusing and easier to get around.
Walla Walla, WA	28,663	--	City installed one-way streets which caused 15% reduction in Main Street traffic, revenue dropped, customers revolted, and increased number of accidents and close calls. Since returned to two-way, City has experienced more local investment.
Washington, MO	12,000	--	Vacancy has dropped from 25-30% to 1-2%. Through traffic has slowed down.
West Palm Beach, FL	85,000	--	Dramatic increase in residential, retail shops, and restaurants. "This is now the hottest shopping district in the area." Several new shops have moved into the area that would not have moved into the area had the one-way street pattern remained. Reduced travel speeds and increased exposure.
Woonsocket, RI	44,000	--	Very supportive of change. Vacancy rate has dropped from 50% to less than 20%. Many new businesses.
York, PA	43,000	--	"Wildly successful" with slower travel speeds, reduced volumes, and fewer accidents.
Dubuque, IA	60,000	6,000	Very positive, better access, pedestrian friendly, and reduced confusion.
Gardner, MA	22,000	40,000	Conversion immediately increased development and reduced vacancy. Slow down in traffic speed and more user-friendly. Concerns with increased congestion did not occur. By all accounts, converting back to two-way traffic has been very successful.
Green Bay, WI	97,000	5,000	Conversion to two-way has worked well, creating better vehicle access, dispersing traffic, and exposure for business.

City of Sacramento, CA Central City Two-Way Conversion Study 2006
Population: 456,451

Purpose:

- Review all the one-way streets in the Central City and define a full range of "conversion options" (i.e. segments of one-way couplets or streets that could be converted to two-way operations.
- Evaluate the pros and cons of the conversion options and to select one or two conversion options for implementation.

Objective:

- Enhance neighborhood livability
- Supports continued revitalization of the commercial area of the Central City
- Promotes pedestrian friendly and safe environments
- Ensure feasibility and ability to be implemented

Eight streets were selected for further study of conversion to two-ways. Potential reconfigurations:

- Restriping roads
- Adding new traffic signal equipment/poles and heads/loops/rail gate flasher
- Removing/modifying location of street signs
- Removing existing curb-side planters
- Relocating streets lights
- Constructing an extra lane

Alternative to 2-way conversion:

- Reduce one-way lanes and make improvements to bike and pedestrian lanes. Alternate was found to be environmentally superior to converting to 2-ways because it reduces the number of traffic segments and intersections which are significantly impacted under long range cumulative conditions, and also reduces the potential impacts to bikeways, noise, and cultural resources.

Status:

- The City of Sacramento did decide to convert several of their streets to two-way traffic; they are currently in the design process.

More information:
http://www.cityofsacramento.org/transportation/engineering/fundingcentral.html

---

Hendersonville, NC Main Street Redesign
Population: 10,420

Purpose:

- Pedestrians in the downtown shopping district had a difficult time crossing a wide street with heavy traffic. The vitality of the downtown shopping district was threatened because of this uncomfortable environment for pedestrians and the addition of new shopping opportunities on the outside of town.

Solution:

- Traffic calming and pedestrian-oriented design
- Conversion of the original street (two lanes of travel in both direction and parallel parking on both sides of the street) to a single two-way street
- Narrowing of Main Street from four lanes to two and in the middle of each block a quick bend in the street created a lateral shift of the entire street
- Mid-block curves were formed by curb bulb-outs that open into marked crosswalks at the peak of each curve; at these points traffic moves slowly and pedestrian crossing distance is

reduced to two lanes; alternating lateral shifts also opened space for diagonal parking, while the opposite side of the street offered parallel parking.

- Entire area enhanced with landscaping and street furniture.
- TIF district financing

Results:

- Serpentine layout slowed traffic, making the street safer for pedestrians, and giving drivers the chance to see local businesses
- Mid-block crosswalks were shortened, making street crossings safer and more comfortable for pedestrians
- Pedestrian improvements helped the Main Street area achieve economic success; downtown area experienced a renaissance
- Downtown property values increased after roadway improvements
- Visibility of businesses along the street improved for drivers
- A waiting list for downtown locations was created (business and apartments)
- Pedestrian traffic on Main Street, once virtually non-existent, increased to an average of 1,750 pedestrians per day

Estimated Cost for One-way/two-way street conversions:

- $12,400 to $124,000 per kilometer ($20,000 to $200,000 per mile), depending on length of treatment and whether modification to signals is required; if crossovers are needed at the end points of the one-way streets, the cost may increase by millions of dollars

For more information: USDOT: Pedsafe
http://www.walkinginfo.org/pedsafe/pedsafe_curb1.cfm?CM_NUM=13

Lexington, KY University of Kentucky Study: Traffic Concept One: Converting One-way Streets to Two-way
Population: 268,080

Purpose:

- Perform a feasibility study of converting two one-way streets in downtown Lexington to two-way streets

Objective:

- Enhance the livability of the College Town area
- Improve pedestrian safety
- Enhance retail district

Proposed solution:

- Convert streets to two-ways
- Increase on street parking
- Implement textured pedestrian crossing intersections
- Bulb-out intersections
- Improve sidewalks, landscaping, sidewalk furniture (create a physical and visual environment that causes drivers to travel more slowly)
- Possibly include dedicated bicycle lanes

Study findings:

- What works best depends on location
- All existing streets in downtown Lexington can accommodate two-way traffic without changing curb-to-curb dimensions
- The streets can accommodate on-street parallel parking, usually on both sides of the street, without alterations to the existing street sections
- Return to the two-way system for appurtenant consequence of bustling neighborhoods is recommended

For more information: University of Kentucky/LFUCGC College Town Study
http://64.233.167.104/search?q=cache:L_r3maF-kJQJ:www.lexingtondda.com/collegetown/11UKBOOK-TRAFFIC.pdf+studies+on+converting+one-way+streets&hl=en&ct=clnk&cd=18&gl=us

---

Holyoke, MA Effects of Two-Way Traffic Flow on High and Maple Streets in the City of Holyoke: Final Report
Population: 39,958

Purpose:

- Perform a traffic study to determine the impact of converting High Street and Maple Street from one-way to two-way traffic

Objective:

- Create a more livable and economically successful downtown area
- Create more pedestrian-friendly downtown by reducing traffic speed and reducing distance needed to cross the street

Two-way transportation impact considerations:

- Need for new traffic signal heads, posts and mastarms
- Modification of existing timing signals

- Potential need for upgrade of existing traffic signal equipment and control units
- New pavement marking/striping
- Location of parking meters and no parking signs and zones will need to be changed
- More congestion and slower speeds may be created, thus increasing the service time of existing transit routes

Study conclusions and recommendations:

- Both High Street and Maple Street are capable of accommodating two-way traffic flow and could assist in reducing vehicle speeds, encourage pedestrian traffic, and assist in ongoing redevelopment efforts to make downtown more economically successful
- New traffic signal timing will be needed
- The City should meet with local business owners to devise a plan to accommodate deliveries (loading zones) in the downtown area

Cost:

- The City plans to hire a qualified professional engineering firm to develop a preliminary cost estimate to convert High and Maple streets to two-ways; information on the cost to upgrade existing traffic signal equipment, signs, pavement markings, and parking meters should be included as part of this estimate

Status:

- Streets remain as one-ways at the present time

For more information: Pioneer Valley Planning Commission
http://64.233.167.104/search?q=cache:90-eCe-yoNYJ:www.pvpc.org/resources/transport/hlyke_traf.pdf+converting+one-way+streets+studies&hl=en&ct=clnk&cd=14&gl=us

---

Dayton, OH Downtown Dayton Two-Way Street Grid Planning Study
Population: 156,771

Purpose:

- Prepare a transportation study to assess the traffic-related effects of converting the existing one-way street grid system in downtown Dayton, OH to a two-way grid system

Objective:

- Effect of the proposed two-way streets ability to operate at acceptable levels of service during peak hours
- Effects of the two-way streets on on-street parking supply
- Effects of the two-ways streets on improving pedestrian safety downtown

Potential needed configurations:

- Construction of right-turn bays and left-turn bays
- Conversion of curb lane to on-street parking in some areas to offset the loss of on-street metered parking due to roadway improvements

Conclusion of study:

- Conversion of all streets to two-way operation with no significant adverse effects on parking or pedestrians
- Conversion to two-way streets would operate at acceptable levels of services
- Increased congestion under the two-way system as well as varying degrees of loss of parking spaces, but changes found to be acceptable
- Enhanced traffic flow between I-75 and downtown and between US-35 and downtown

Status:

- The City decided to go ahead with the conversion and are in the design stage

For more information: Miami Valley Regional Planning Commission
http://www.mvrpc.org/daytonGrid/gridFinal.php

Atlanta, GA Bakers Street Two-Way Street Conversion and PATH Project Feasibility Analysis
Population: 486,411

Purpose:

- Determine the feasibility of converting Baker Street and/or Harris Street to two-way traffic and how such a change might impact immediately adjacent land uses and the overall street network flow

Objective:

- Determine whether converting either of the streets to two-way traffic would ultimately improve traffic flow from activity centers
- Ascertain if conversion can meet goals of the planned mixed-use neighborhood for pedestrian friendly, retail thriving community

Conclusions and recommendations:

- Conversion of streets to two-way traffic meets the connectivity goals of the City
- Under this condition, traffic operations along the corridor are projected to operate at acceptable levels of service
- Delivery/loading operation will need to be addressed

- Improved connectivity and travelers provided with alternative routes for accessing their destinations

Status:

- Findings of the study were presented to the Connect Atlanta Board in fall 2008

For more information: Central Atlanta Improvement District
http://www.atlantadowntown.com/ImagineDowntown_Baker2Way.asp

Milwaukee, WI Applying New Urbanism Street Principles in Downtown Milwaukee, WI
Population: 573,358

Purpose:

- Utilize new urbanism principles to improve parking availability, traffic circulation patters, and pedestrian conditions to support downtown growth and a high quality of life

Actions/implementation:

- Conversion of the one-way street system to a two-way street system

Results:

- Improved business accessibility
- Creation of less confusing circulation system for downtown visitors and business customers
- Enhanced transit system by making it easier for passengers to board and exit city busses at the same intersection in closer proximity to their destinations

For more information: Institute of Transportation Engineers. ITE Journal
http://findarticles.com/p/articles/mi_qa3734/is_200605/ai_n17177161

Wausau, WI Report for City of Wausau, Wisconsin: Downtown Traffic Analysis
Population: 38,435

Purpose:

- Investigate the conversion of select one-way streets to two-way streets in downtown Wausau

Objective:

- Improved access to retail businesses in the Central Business District

Potential issues of conversion:

- Effect on intersections

- Needed changes to the signals to accommodate this direction change?
- Affect of the two-way operation affect the parking garage entrance/exit?
- Prohibition of street parking due to two-way conversion?
- Needed change to intersection lane markings?

Conclusion/findings:

- Conversion to two-way operation, there should be no significant detriment to the system.
- Converting to a two-way system may cause additional delays, but the intersection will operate within acceptable levels of service.
- The conversion may lead to some awkward turning movements into the parking ramp and bank drive-thru entrance.
- The conversion can allow for more parking spaces on the east side of the street.
- Signals may need to be modified to accommodate traffic movements
- Lane markings will need to be modified

Status:

- Summer of 2007, the City of Wausau converted two of its one-way streets to two-ways and have been happy with the results

For more information: City of Wausau
www.ci.wausau.**wi**.us/is/eng/pdf/Traffic**St**udy2006.pdf

Platteville, WI converted their one-way Main Street to a two-way Main Street in 2004.
Population: 9,989

Purpose:

- Improve retail business
- Slow traffic

Initial conversion concerns:

- Delivery problems
- Vehicular traffic congestion
- Pedestrian safety

Post conversion:

- Delivery trucks are making deliveries and pedestrians are crossing the street safely
- Residents and visitors love the new two-way Main Street

Cost:

- $1,000 (primarily for paint and signage)

For more information: Wisconsin Main Street Program: commerce.wi.gov/CD/CD-WMSreport01-02.pdf

---

Waukesha and Kenosha WI 2008 Congestion Mitigation and Air Quality Award
Population: 67,814

May 2008, Governor Doyle announced the 2008 CMAQ award winners. The City of Kenosha received a CMAQ award totaling $144,680 for a $180,850 project that includes optimizing six signal systems (46 intersections) in the City of Waukesha based on current traffic patters and the conversion of one-way streets to two-way operation.

For more information: WisDOT
http://www.dot.state.wi.us/opencms/export/nr/modules/news/news_0731.html_786229440.html

---

Additional One-Way Street Conversion Resources:

Hart, Jere. 1998. "Converting Back to Two-Way Streets in Downtown Lubbock." Institute of Transportation Engineers. *ITE Journal*, August. Available online at http://findarticles.com/p/articles/mi_qa3734/is_199808/ai_n8818135.

- Reports that Lubbock's conversion of two sets of one-way pairs to two-way streets has been beneficial for businesses and has had minimal impact on traffic flow and safety.

Stemley, John. 1998. "One-Way Streets Provide Superior Safety and Convenience." Institute of Transportation Engineers *ITE Journal*, August. Available online at http://findarticles.com/p/articles/mi_qa3734/is_199808/ai_n8815091 .

- The other side of the debate: this article argues in favor of one-way streets.

U.S. Department of Transportation, Federal Highway Administration. n.d. "One-Way/Two-Way Street Conversions." Pedsafe Pedestrian Safety Guide and Countermeasure Selection System. Website available online at http://www.walkinginfo.org/pedsafe/pedsafe_curb1.cfm?CM_NUM=13

- Discusses the purposes, considerations, and costs of conversion; unfortunately the case study links provided are not relevant.

Walker, G. Wade, Walter M. Kulash, and Brian T. McHugh. 1999. "Downtown Streets: Are We Strangling Ourselves on One-Way Networks?" *Transportation Research Board Circular E-CO19: Urban Street Symposium*. PDF available online at http://onlinepubs.trb.org/onlinepubs/circulars/ec019/Ec019_f2.pdf .

- Comparison of one-way vs. two-way streets; presents an evaluation methodology for considering two-way conversion.

Conversion Studies:

Ayers Saint Gross. "Traffic Concept One: Convert One-Way Streets in the Study Area to Two-Way Traffic." In *University of Kentucky/LFUCG College Town Study*. Lexington Downtown Development Authority. PDF available online at http://www.lexingtondda.com/collegetown/11UKBOOK-TRAFFIC.pdf .

- Evaluates one vs. two-way streets and recommends conversion to two-way streets to improve commercial activity. Cites AASHTO study.

Fargo (North Dakota), City of. 2001. *Fargo One-Way Pairs Analysis*. Appendix A in Downtown Fargo Framework Development Plan. PDF available online at http://www.cityoffargo.com/attachments/c9d3045f-fdf3-4753-9335-43c8c361819a/Appendix%20A.pdf .

- Technical memo surveys available studies and literature regarding conversions to assess impacts and identify trends.

Fehr and Peers Associates, Inc. 2001. *Final Report: Curtis Park/Five Points One-Way to Two-Way Conversion Study*. Prepared for the City and County of Denver. Available online at http://www.denvergov.org/Portals/501/documents/Final%20Report.doc.

- Section VI sums up impacts of conversion on a number of aspects and provides cost estimates.

Parsons Brinkerhoff Ohio, Inc. 2004. *Dayton Two-Way Street Grid Planning Study: Traffic Analysis and Modeling Report*. Prepared for Miami Valley Regional Planning Commission. Links to PDFs available online at http://www.mvrpc.org/daytonGrid/gridFinal.php.

- Assesses the traffic-related effects of converting downtown Dayton OH's existing one-way street grid system to a two-way system, looking at Levels of Service and parking and pedestrian impacts. Conversion would increase congestion to some degree and result in lost parking spaces, but acceptable LOS would be maintained.

Pioneer Valley Planning Commission. 2002. *Effects of Two-Way Traffic Flow on High and Maple Streets in the City of Holyoke*. PDF available online at http://www.pvpc.org/resources/transport/hlyke_traf.pdf

- Recommends conversion but lists further issues to study.

Downtown Analysis Key Market Implications

- The dramatic shift in the distribution of population by age in Manitowoc and the region will result in changing housing demand. With more adult-only households and shifting housing preferences, the regional market will likely see growing demand for smaller, amenity-rich units located in vibrant and active places and a declining market for large single-family homes on expansive lots.
- Downtown's workforce is concentrated in service, retail, and government. The public sector jobs can be expected to remain stable but the service and retail positions will be subject to shifts of the larger regional and national economy. Creating an active, vibrant, and attractive downtown will be vital to ensuring that these industries continue to provide jobs for Manitowoc's residents. Over 25% of Manitowoc's workforce is employed downtown and almost 70% of these workers are employed in either retail or service positions. Given these facts, the City's economy depends on maintaining the strength and ensuring long-term investment in downtown.
- Downtown Manitowoc's retail market appears relatively strong but with some key weaknesses. Downtown has begun to transition from a utilitarian retail market providing basic goods and services to a niche retail market offering specialty products and community services. Most of the current stores downtown are smaller establishments with limited sales and tight profit margins. To improve the downtown market and attract new businesses and customers, downtown business and property owners, together with the public sector, need to establish a strong organization to enhance downtown's business mix; determine retail markets it can penetrate; and develop strategies to coordinate downtown image-building and marketing, community events, and targeted reinvestment in infrastructure including vacant and under-utilized sites.
- Manitowoc has several important and unique tourism assets. The City's historic character, maritime traditions, and scenic location give the City and downtown untapped tourism potential that should be leveraged further to help support the local economy.
- The different components of downtown Manitowoc's market are self-reinforcing and codependent. Greater strength in one area will support other areas as well (i.e. bringing more tourists to downtown Manitowoc will create more retail customers resulting in new stores which help attract new residents supporting new housing growth which supports more retail, etc.). Ultimately, the key to the market success of all aspects of downtown will be to build on its existing strengths and work to create a more dynamic, full-service, diverse, and attractive place for Manitowoc residents and visitors alike. A focus on amenity, convenience, and "being close to the action" will be a powerful driver in revitalizing downtown.
- Downtown housing must be encouraged to take full advantage of available, vacant upper floors in downtown buildings. The economic feasibility equation, however, must be altered so that the balance between development costs and the revenues associated with undertaking a specific type of project is more economically viable. Adding more viable housing to the downtown will translate into greater demand for downtown commercial development.
- The Community Survey completed as part of the Comprehensive Planning process indicates that Manitowoc's residents have a strong interest in seeing their downtown succeed and they have a strong desire to shop and dine in the downtown. However, the current mix of retail and dining offerings is not meeting their needs. Moving forward, it will be important for the

City's downtown leadership to be cognizant of what residents want in the downtown and to work toward fostering downtown business development that meets those community desires.

- Comparing downtown Manitowoc's market position today with the data and descriptions of the area in the 1993 Revitalization Strategy indicates that downtown has made good strides by adding stores and square footage. However, as the 1993 report projected, the over-supply of retail space limited growth in retail businesses in the intervening years and retail development continued to shift toward the City's periphery. Additionally, the loss of Cook's Corner in 2007 represented a major loss of a key retail anchor. Moving forward, the downtown will need to work to position the area as a niche shopping district that provides a unique, character-rich shopping experience different from the more utilitarian retail offerings in the Harbor Town area. The establishment of the designated Main Street district will help provide a framework from which to create a more unified and integrated downtown retail and restaurant market.

North Side Retail Area Market Analysis

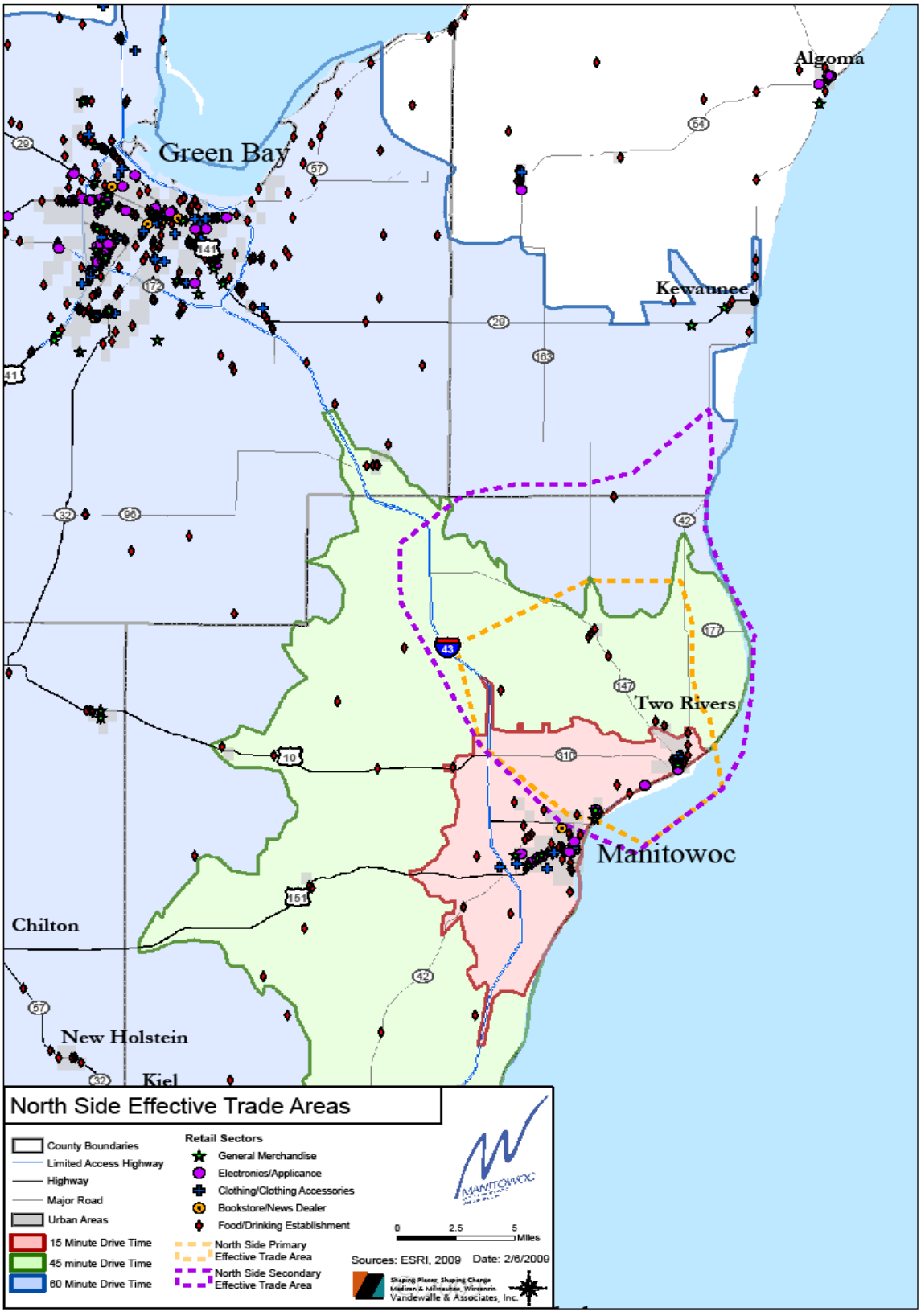
Trade Area Delineation

Manitowoc's North Side mall and retail area is somewhat more difficult to understand than either downtown or the Harbor Town district. As an older retail area that has lost some of its retail luster to interstate locations, and is not located in the center of the community, it is likely to be less well-known outside of the City and its trade area is more constricted.

Similar to the Harbor Town and downtown analysis, the method for delineating this trade area starts with looking at drive times from the site (15 minutes and 30 minutes). Because it is further from Interstate 43 and has Lake Michigan as an eastern boundary, the drive times from the North Side encompass a small area. From a competition standpoint, regional consumer activity and new large format retail establishments would be more likely to locate in the Harbor Town area, given its accessibility and visibility. In addition specialty retail and services are more likely to locate in proximity to larger retail districts such as downtown Manitowoc or downtown Two Rivers.

Because of these factors, the geography of North Side's PETA and SETA is more limited than those for Harbor Town or downtown. However, the lack of similar retail in areas north of the City extends the area north to capture some consumers who are likely to be familiar with the area, and would view the North Side as more convenient than Harbor Town.

Map 4: North Side Trade Area Map



Trade Area Consumer Profile and Spending Patterns

Tables 11 and 12 provide an overview of the demographics and consumer patterns of residents of the North Side's PETA and SETA. Compared with other parts of the region captured in the Harbor Town trade areas, the north side trade areas have somewhat lower median household incomes and higher median ages. Additionally, these areas are not projected to see population growth between 2008 and 2013.

The top tapestry segments in the PETA are "Rustbelt Traditions" (28%), "Salt of the Earth" (24%), "Rustbelt Retirees" (15%), "Simple Living" (10%), and "Great Expectations" (7%) (see Figure 3 for descriptions of the characteristics of these segments). Similar to the Harbor Town and downtown trade areas, the residents of the North Side trade areas typically spend significantly less on consumer goods than average U.S. households. The spending potential index for both the downtown's PETA and SETA is below average in all retail categories.

Table 11: North Side PETA Demographics and Spending Patterns

Retail Goods and Services

Northside Primary Trade Area

Top Tapestry Segments:		**Demographic Summary**	**2008**	**2013**
Rustbelt Traditions	28.3%	Population	22,904	22,868
Salt of the Earth	23.9%	Households	9,905	9,995
Rustbelt Retirees	14.9%	Families	6,377	6,368
Simple Living	10.0%	Median Age	41.6	43.0
Great Expectations	6.6%	Median Household Income	$52,262	$61,219

	Spending Potential Index	**Average Amount Spent**	**Total**
Apparel and Services	69	$1,844.17	$18,266,474
Men's	69	$341.62	$3,383,740
Women's	67	$628.18	$6,222,166
Children's	77	$319.20	$3,161,711
Footwear	56	$269.63	$2,670,689
Watches & Jewelry	79	$177.22	$1,755,394
Apparel Products and Services (1)	86	$108.31	$1,072,774
Computer			
Computers and Hardware for Home Use	80	$168.06	$1,664,614
Software and Accessories for Home Use	77	$22.18	$219,665
Entertainment & Recreation	85	$3,151.52	$31,215,783
Fees and Admissions	80	$496.13	$4,914,163
Membership Fees for Clubs (2)	81	$135.09	$1,338,053
Fees for Participant Sports, excl. Trips	83	$94.62	$937,234
Admission to Movie/Theatre/Opera/Ballet	77	$115.11	$1,140,177
Admission to Sporting Events, excl. Trips	79	$47.91	$474,583
Fees for Recreational Lessons	81	$102.95	$1,019,721
Dating Services	75	$0.44	$4,395
TV/Video/Sound Equipment	84	$1,201.26	$11,898,513
Community Antenna or Cable TV	88	$647.13	$6,409,860
Televisions	78	$229.35	$2,271,692
VCRs, Video Cameras, and DVD Players	88	$29.17	$288,964
Video Cassettes and DVDs	83	$54.14	$536,269
Video Game Hardware and Software	85	$30.30	$300,138
Satellite Dishes	96	$1.07	$10,638
Rental of Video Cassettes and DVDs	82	$41.59	$411,904
Streaming/Downloaded Video	73	$0.59	$5,835
Sound Equipment (3)	77	$163.11	$1,615,622
Rental and Repair of TV/Radio/Sound Equipme	82	$4.80	$47,591
Pets	91	$402.24	$3,984,187
Toys and Games	84	$125.30	$1,241,094
Recreational Vehicles and Fees (4)	90	$394.67	$3,909,226
Sports/Recreation/Exercise Equipment (5)	79	$170.16	$1,685,440
Photo Equipment and Supplies (6)	85	$107.84	$1,068,130
Reading (7)	88	$253.92	$2,515,030
Food	85	$7,040.96	$69,740,686
Food at Home	85	$4,162.40	$41,228,558
Bakery and Cereal Products	86	$582.79	$5,772,564
Meat, Poultry, Fish, and Eggs	85	$1,039.12	$10,292,469
Dairy Products	86	$478.41	$4,738,643
Fruit and Vegetables	83	$688.46	$6,819,153
Snacks and Other Food at Home (8)	86	$1,373.62	$13,605,729
Food Away from Home	84	$2,878.56	$28,512,128
Alcoholic Beverages	82	$488.51	$4,838,708
Nonalcoholic Beverages at Home	86	$377.48	$3,738,905

Source: ESRI

Table 12: North Side SETA Demographics and Spending Patterns

Retail Goods and Services

Northside Secondary Trade Area

Top Tapestry Segments:		**Demographic Summary**	**2008**	**2013**
Salt of the Earth	26.6%	Population	30,873	30,892
Rustbelt Traditions	24.6%	Households	13,058	13,205
Rustbelt Retirees	13.7%	Families	8,670	8,682
Simple Living	7.6%	Median Age	41.7	43.0
Green Acres	6.4%	Median Household Income	$54,229	$62,826

	Spending Potential Index	**Average Amount Spent**	**Total**
Apparel and Services	71	$1,904.38	$24,867,418
Men's	71	$353.04	$4,610,032
Women's	69	$648.60	$8,469,395
Children's	80	$329.59	$4,303,742
Footwear	57	$277.16	$3,619,096
Watches & Jewelry	83	$185.03	$2,416,130
Apparel Products and Services (1)	88	$110.97	$1,449,023
Computer			
Computers and Hardware for Home Use	82	$172.98	$2,258,769
Software and Accessories for Home Use	79	$22.92	$299,303
Entertainment & Recreation	88	$3,275.33	$42,769,201
Fees and Admissions	84	$516.57	$6,745,406
Membership Fees for Clubs (2)	85	$140.42	$1,833,640
Fees for Participant Sports, excl. Trips	86	$98.68	$1,288,601
Admission to Movie/Theatre/Opera/Ballet	80	$118.88	$1,552,306
Admission to Sporting Events, excl. Trips	82	$50.03	$653,284
Fees for Recreational Lessons	85	$108.10	$1,411,587
Dating Services	78	$0.46	$5,988
TV/Video/Sound Equipment	86	$1,236.64	$16,148,082
Community Antenna or Cable TV	90	$665.85	$8,694,692
Televisions	81	$236.94	$3,094,017
VCRs, Video Cameras, and DVD Players	91	$30.17	$393,930
Video Cassettes and DVDs	85	$55.44	$723,975
Video Game Hardware and Software	87	$31.17	$406,985
Satellite Dishes	100	$1.11	$14,438
Rental of Video Cassettes and DVDs	83	$42.43	$554,053
Streaming/Downloaded Video	77	$0.62	$8,069
Sound Equipment (3)	79	$168.03	$2,194,075
Rental and Repair of TV/Radio/Sound Equipme	84	$4.89	$63,848
Pets	95	$420.52	$5,491,199
Toys and Games	87	$129.44	$1,690,221
Recreational Vehicles and Fees (4)	96	$419.53	$5,478,207
Sports/Recreation/Exercise Equipment (5)	82	$177.03	$2,311,686
Photo Equipment and Supplies (6)	88	$112.32	$1,466,674
Reading (7)	92	$263.27	$3,437,726
Food	87	$7,270.93	$94,943,866
Food at Home	88	$4,297.81	$56,120,787
Bakery and Cereal Products	89	$601.82	$7,858,626
Meat, Poultry, Fish, and Eggs	88	$1,072.90	$14,009,897
Dairy Products	89	$494.48	$6,456,979
Fruit and Vegetables	86	$710.54	$9,278,228
Snacks and Other Food at Home (8)	89	$1,418.06	$18,517,057
Food Away from Home	87	$2,973.13	$38,823,079
Alcoholic Beverages	84	$501.34	$6,546,490
Nonalcoholic Beverages at Home	88	$389.66	$5,088,216

Source: ESRI

Retail Gap Analysis: Existing Retail Sales and Potential Opportunities

Tables 13 and 14 show existing retail sales for the PETA and SETA as well as potential retail sales for these areas given their populations and demographic characteristics. Both these areas currently show a retail gap with sales that are significantly less than potential demand. Gasoline stations and health/personal care stores are the only sectors in the PETA and SETA where potential sales significantly exceed existing sales. In all other retail categories, there appears to be the potential to add new establishments to capture sales currently leaking to other areas. However, in the case of the North Side, it is important to note that the area's trade area overlaps with the trade areas for Harbor Town, and Harbor Town's location is much better suited to new large-scale retail development than the North Side.

Table 13: North Side PETA Retail Spending and Gap Analysis

Northside Primary Trade Area					
Summary Demographics					
2008 Population	22,904				
2008 Households	9,905				
2008 Median Disposable Income	$39,722				
2008 Per Capita Income	$26,419				
Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$242,259,962	$134,094,924	**$108,165,038**	**28.7**	174
Total Retail Trade (NAICS 44-45)	$209,507,300	$119,049,541	**$90,457,759**	**27.5**	123
Total Food & Drink (NAICS 722)	$32,752,662	$15,045,383	**$17,707,279**	**37.0**	51
Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$51,866,745	$14,811,117	**$37,055,628**	**55.6**	18
Automobile Dealers (NAICS 4411)	$43,635,534	$10,228,718	**$33,406,816**	**62.0**	7
Other Motor Vehicle Dealers (NAICS 4412)	$5,177,860	$1,728,863	**$3,448,997**	**49.9**	3
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$3,053,351	$2,853,536	**$199,815**	**3.4**	8
Furniture & Home Furnishings Stores (NAICS 442)	$5,764,887	$887,108	**$4,877,779**	**73.3**	6
Furniture Stores (NAICS 4421)	$3,345,143	$163,251	**$3,181,892**	**90.7**	1
Home Furnishings Stores (NAICS 4422)	$2,419,744	$723,857	**$1,695,887**	**53.9**	5
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$7,554,593	$2,102,900	**$5,451,693**	**56.5**	6
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$6,307,125	$2,296,894	**$4,010,231**	**46.6**	11
Building Material and Supplies Dealers (NAICS 4441)	$5,470,838	$2,256,913	**$3,213,925**	**41.6**	10
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$836,287	$39,981	**$796,306**	**90.9**	1
Food & Beverage Stores (NAICS 445)	$47,974,356	$37,828,300	**$10,146,056**	**11.8**	10
Grocery Stores (NAICS 4451)	$45,891,332	$37,298,331	**$8,593,001**	**10.3**	6
Specialty Food Stores (NAICS 4452)	$884,795	$330,204	**$554,591**	**45.6**	3
Beer, Wine, and Liquor Stores (NAICS 4453)	$1,198,229	$199,765	**$998,464**	**71.4**	1
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$7,811,016	$10,521,779	**-$2,710,763**	**-14.8**	10
Gasoline Stations (NAICS 447/NAICS 4471)	$34,309,024	$35,382,018	**-$1,072,994**	**-1.5**	11
Clothing and Clothing Accessories Stores (NAICS 448)	$6,456,578	$689,295	**$5,767,283**	**80.7**	4
Clothing Stores (NAICS 4481)	$4,045,868	$316,631	**$3,729,237**	**85.5**	2
Shoe Stores (NAICS 4482)	$1,152,988	$0	**$1,152,988**	**100.0**	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$1,257,722	$372,664	**$885,058**	**54.3**	2
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$3,727,713	$1,591,739	**$2,135,974**	**40.2**	7
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$2,282,807	$1,201,405	**$1,081,402**	**31.0**	6
Book, Periodical, and Music Stores (NAICS 4512)	$1,444,906	$390,334	**$1,054,572**	**57.5**	1

Source: ESRI

Table 14: North Side SETA Retail Spending and Gap Analysis

Northside Secondary Trade Area					
Summary Demographics					
2008 Population	30,873				
2008 Households	13,058				
2008 Median Disposable Income	$41,108				
2008 Per Capita Income	$26,820				
Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$330,929,640	$144,245,451	**$186,684,189**	**39.3**	199
Total Retail Trade (NAICS 44-45)	$286,262,901	$127,840,040	**$158,422,861**	**38.3**	141
Total Food & Drink (NAICS 722)	$44,666,739	$16,405,411	**$28,261,328**	**46.3**	58
Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$71,075,517	$15,978,409	**$55,097,108**	**63.3**	19
Automobile Dealers (NAICS 4411)	$59,737,496	$10,553,533	**$49,183,963**	**70.0**	7
Other Motor Vehicle Dealers (NAICS 4412)	$7,172,897	$2,502,427	**$4,670,470**	**48.3**	3
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$4,165,124	$2,922,449	**$1,242,675**	**17.5**	9
Furniture & Home Furnishings Stores (NAICS 442)	$7,924,033	$1,046,945	**$6,877,088**	**76.7**	6
Furniture Stores (NAICS 4421)	$4,612,306	$278,486	**$4,333,820**	**88.6**	1
Home Furnishings Stores (NAICS 4422)	$3,311,727	$768,459	**$2,543,268**	**62.3**	5
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$10,334,855	$2,204,279	**$8,130,576**	**64.8**	7
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$8,777,059	$3,377,935	**$5,399,124**	**44.4**	16
Building Material and Supplies Dealers (NAICS 4441)	$7,632,226	$3,214,255	**$4,417,971**	**40.7**	13
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,144,833	$163,680	**$981,153**	**75.0**	3
Food & Beverage Stores (NAICS 445)	$65,139,773	$40,366,611	**$24,773,162**	**23.5**	12
Grocery Stores (NAICS 4451)	$62,136,318	$38,716,679	**$23,419,639**	**23.2**	6
Specialty Food Stores (NAICS 4452)	$1,394,515	$1,450,167	**-$55,652**	**-2.0**	5
Beer, Wine, and Liquor Stores (NAICS 4453)	$1,608,940	$199,765	**$1,409,175**	**77.9**	1
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$10,614,064	$10,623,568	**-$9,504**	0.0	10
Gasoline Stations (NAICS 447/NAICS 4471)	$46,799,505	$37,963,941	**$8,835,564**	**10.4**	12
Clothing and Clothing Accessories Stores (NAICS 448)	$8,759,868	$689,295	**$8,070,573**	**85.4**	4
Clothing Stores (NAICS 4481)	$5,493,641	$316,631	**$5,177,010**	**89.1**	2
Shoe Stores (NAICS 4482)	$1,543,235	$0	**$1,543,235**	**100.0**	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$1,722,992	$372,664	**$1,350,328**	**64.4**	2
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$5,011,720	$1,799,225	**$3,212,495**	**47.2**	10
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$3,085,679	$1,408,891	**$1,676,788**	**37.3**	9
Book, Periodical, and Music Stores (NAICS 4512)	$1,926,041	$390,334	**$1,535,707**	**66.3**	1

Source: ESRI

Key North Side Traffic Count Data

The North Side retail area's traffic counts reflect the struggle this area is facing in maintaining its retail position. Highway 10, just east of its intersection with Highway 42, has an average daily traffic volume of about 10,000 cars. Highway 42 north of this intersection carries about 16,000 cars and south of the intersection carries about 11,000 daily cars. These traffic counts reflect a well-used but locally-oriented commercial street. This level of visibility would typically not support the development of new large-scale national retail stores. These traffic counts are more likely to support smaller-scale, community-oriented commercial and mixed use residential/commercial development.

Market Analysis Summary and Conclusions

- Manitowoc's Harbor Town area is likely to continue to emerge as the City's location of choice for large scale retail development. The area's location at the intersection of two primary highways, its high traffic counts and visibility, and its potential to support large-format retail construction all contribute to this area's potential. Because of its accessibility and lack of nearby competing areas, Harbor Town has geographically large primary and secondary trade areas and data on retail sales indicates that additional stores in many retail sectors could be feasible at this location (including furniture, apparel, books, and electronics). As the City continues to encourage development in the Harbor Town area, it will be important to promote projects that fully take advantage of the site's assets and create destinations that will help draw visitors and residents of the region into the community.
- Manitowoc's downtown has a number of valuable assets that contribute to its potential. Qualitative assets such as the lakefront, riverfront, and historic architecture all add to the potential appeal of the downtown. From a more quantitative perspective, the downtown currently generates significant retail sales and has viable retail establishments. However, according to citizen survey information, the downtown's current retail and restaurant offerings are not meeting the needs of residents. The significant level of vacancy and reduced market rents in the downtown further reflect the fact that downtown's current retail offerings are not generating the foot traffic needed to support the downtown retail market. Further, the downtown lacks a strong anchor or key niche to help expand its market and draw more shoppers. With the establishment of the Main Street District, and the creation of a visionary plan for long-term downtown redevelopment, the City now has an opportunity to shape the market and positively affect the downtown's market position to create a more successful retail district.
- The North Side Mall area of Manitowoc exhibits characteristics typical of declining retail areas that are neither in the downtown, nor on major traffic routes. As Harbor Town continues to develop, most major retailing activity will converge there, leaving the North Side to continue to decline. However, with its proximity to the downtown and the lakefront, this area does have potential for redevelopment. Rather than being a major retail district, the market for the North Side may shift toward supporting smaller-scale, neighborhood retail combined with new office and housing development. Again however, the future of this area will depend on proactive leadership in the community that recognizes market realities while advancing forward-thinking concepts.