Market Analysis & Marketing Plan

For

Saint Albans, Vermont

Prepared for the City of Saint Albans by:

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1.0 Introduction

1.1 Background and Purpose

Saint Albans has committed itself to the revitalization of its downtown core as an effort to remain a vibrant economic hub for the citizens of the City, the surrounding communities, and Franklin County. The creation of Saint Albans for the Future (SAFF) and downtown designation are testaments to this dedication and hard work. Now, the community has realized that a thorough market study and marketing plan for the downtown is keystone to revitalization considering the changing retail climate in the community as well as its position in the greater Burlington retail market.

In the summer of 2005, Saint Albans for the Future (SAFF) hired Arnett Muldrow & Associates to perform a market study focusing including the following components:

- A **retail market analysis** that defines the local market and determines areas to expand downtown's retail offerings
- A **survey of businesses** located in downtown.
- A **telephone survey** of Saint Albans residents.
- A **marketing plan** that creates a downtown brand and marketing concepts to promote the community to its residents and visitors.
- An **implementation strategy** that outlines all of the visions recommendations for continued downtown revitalization.

The retail market analysis will help economic development agencies recruit underrepresented retail sectors and enhance the retail mix in downtown to better meet the needs of the community. The surveys provide insight into the attitudes and preferences of merchants and customers. The marketing plan, beginning with a community imaging and branding process, will present marketing concepts supported by specific market opportunities, and help define its role in the regional market. The implementation strategy will link the retail assessment, survey work, and marketing plan into a concise work plan for the community to use to implement the recommendations of this report.

1.2 Process

Arnett Muldrow & Associates, Ltd. was hired to conduct the effort in July of 2005. The process began when Arnett Muldrow held a three-day workshop where over 50 people were interviewed in one-on-one meetings and group sessions. These stakeholder meetings, conducted from July 6th-8th, included:

- St. Albans City Council and Mayor
- City Manager & Staff
- Franklin County representatives
- Shop owners
- Key stakeholders, business owners and property owners
- Real estate professionals
- Community leaders
- Corporate leaders
- Community beautification and historic groups
- Arts organization/events coordinators
- School Officials
- Hospital representative

In addition, the team conducted a reconnaissance of the town examining the various business sectors, retail growth areas, key gateways and entrances into the community, as well as the overall physical environment of downtown. This initial workshop helped the team identify the key challenges and opportunities within the downtown commercial market, understand the scope of existing marketing capabilities, and begin to develop a brand identity for downtown Saint Albans.

Shortly thereafter, business owners assisted Arnett Muldrow by conducting a zip code survey of their customers and a merchant survey during the last week in July. After compiling the results of the zip code surveys, Arnett Muldrow used this information to define the trade areas for downtown Saint Albans. This exercise was followed by a comprehensive market definition study, sales and retail leakage analysis, and a retail shares analyses for the community.

Finally, a telephone survey of potential customers was conducted during late 2005. Interviewees were asked a series of questions related to their perceptions of downtown, its physical environment, variety and quality of shops and restaurants, among other items.

All of this information, coupled with the issues presented in the interviews, became the basis of the recommendations included in the report.

1.3 Report Format

This plan report is designed to present the findings of the market analysis and marking plan in a brief and easy to understand format. It begins with a strategic assessment report that summarizes the input received in interviews with individual stakeholders and small groups in the community. The report then presents the results of the comprehensive market assessment of downtown, the business survey, the customer survey, and finally the implementation strategies and recommendations.

1.4 Acknowledgments

This report would not have been possible without the participation of many individuals and businesses in Saint Albans. Special thanks goes to the thirty-one businesses that participated in the zip code survey, the many stakeholders who took time out to share their thoughts with us, and the over four hundred area residents who shared their thoughts on a phone survey. Finally, the Saint Albans for the Future (SAFF) organization and its board as well as the City of Saint Albans were instrumental in assisting the project team in data collection, coordinating the meeting schedule, and providing guidance throughout the planning process. This project was partially funded through a grant from the Vermont Agency of Commerce and Community Development.

2.0 Strategic Assessment

The following is the synopsis of the information shared during over fifty individual and small group interviews conducted throughout the course of the planning process, but primarily during the initial kick-off workshop held in July of 2005. The purpose of these meetings was to assess local perspectives of downtown Saint Albans related to the business climate, local economy, overall physical environment, community needs, desires for future investments, as well as opportunities for redevelopment.

A great deal of input was gathered during this initial workshop, and the most pertinent points and themes are listed in the following pages. The passages below are summaries of these comments and represent perceptions of the community as conveyed to the consultant team. These comments do not necessarily reflect the opinion of the consultants but instead are derived from the input given by the interviewees.

Following the summaries of the community input, the primary issues and concerns as determined by the consultant team are presented in brief form. These conclusions, derived from public input as well as our observations, lay the foundation for the detailed recommendations of the plan.

2.1 What We Heard – Strengths

- Historic community with great architecture
- Taylor Park as heart of the community
- Quality school system
- Northern Vermont lifestyle
- Saint Albans Historical Museum
- Farmers Market
- Variety of quality retail & restaurants
- Immigration & Nationalization Service
- Post Office in downtown
- Saint Albans for the Future
- Downtown designation and its benefits
- Proximity to Lake Champlain

- Low crime rate
- Saint Albans is a Walkable community
- Pride in our community
- Family oriented
- Northwestern Medical Center
- Responsive city government

2.2 What We Heard – Challenges

- Potential for Wal-Mart to detract from business downtown
- St. Albans does not promote itself well or at all
- Perception of poor customer service downtown retailers
- We must overcome old guard that does not want to accept change
- There is heavy traffic in downtown, along Main Street
- The location and condition of parking in downtown is poor
- Too many low income apartment units in downtown
- The relationship between the City and Town is extremely poor
- Merchants are lazy… will not take initiative
- Downtown has a "stigma" is constantly being bashed
- Merchants do not clear snow from the sidewalks in winter
- There is a challenge to try and bring activity into Taylor Park
- Several organizations working on similar missions have overlapping efforts
- Signage and directions for visitors is poor
- Parking enforcement is "vindictive"

2.3 What We Heard – Opportunities

- This is opportunity to continue revitalization for downtown
- People in Chittenden County do not know what Saint Albans has to offer and is an untapped market
- There is an opportunity to create physical and psychological connections to Lake Champlain
- Develop vacant properties downtown owned by the Railroad
- Saint Albans can position downtown as the retail hub of the community
- Taylor Park can become more vibrant part of town life -- always have something happening

- There is potential for Wal-Mart to attract more people into the community
- Celebrate the arts and use it as a catalyst for revitalization
- Create a Creative Economy base
- Use history to generate interest in the community.

2.4 What We Heard – Community Needs & Desired Uses

- More sense of stability in community
- Groups and people need to work together
- Expand downtown to Lake Street
- Additional parking in the core. Repair and maintain lots
- Improve alleyways and the rears of buildings
- Public transportation center
- Shuttle service to St. Albans Bay in summer
- Performing arts theatre/center
- More activities for young people
- Downtown needs a theme, or niche
- Higher profile police coverage, particularly in downtown and Taylor Park
- Celebrate youth in community
- College presence in downtown
- Consistent façade improvements to downtown buildings
- Music festivals
- Revolving fund for small business
- Events calendar
- Make the streetlights, sidewalks more historic in feel
- More areas for outdoor dining
- Canopy over downtown
- Regular events in park
- Make downtown handicap accessible
- Repeal anti-skateboarding ordinance
- Create opportunities for middle income and market rate housing
- Condominiums
- City Market such as one in Burlington
- Grocery market
- Family restaurant
- Anchor store
- Men's store
- Book store
- Galleries
- Shoe store
- The Gap
- Pottery store
- Craft or art co-op
- More antique stores
- Vegetarian Restaurant

2.5 Preliminary Issues and Observations

- Downtown Saint Albans gives a powerful first impression to a visitor. From a physical standpoint, there is a excellent stock of historic commercial architecture fronting on Taylor Park, which separates it from downtown from Church Street and its concentration of institutional architecture. While the physical town plan is unique and striking, the presence of children downtown along with the variety of retailers and high occupancy rates give the visitor the impression of a vibrant and active downtown.
- There has been substantial progress to date for downtown revitalization. Beginning with downtown designation, the City government, media, business owners, and downtown employers such as Mylan and INS have continued their support for downtown. SAFF has done an excellent job of building this support.
- Taylor Park truly is the heart of downtown and the community as a whole. Unfortunately, the condition of the park is currently less than desired. The amount of litter in the park does not speak well for the community and maintenance efforts seem to be minimal. Also, other than some of the youth of Saint Albans, activity in the park is limited primarily to the perimeter. The gazebo, fountain, monuments, and garden club projects are all great assets within the park. Downtown revitalization must begin with Taylor Park.
- Efforts in the past to bring housing into downtown have centered on subsidized units. Currently, there are no market rate units in downtown. A mixture of uses, as well as housing types, will help create a broader base for downtown's immediate market.
- The relationship between Saint Albans Town and Saint Albans City governments is very poor, to the detriment of the community at large. A retail, office, or housing market observes no political boundaries. A spirit of cooperation is critical to planning the growth and development of the community, particularly as retail and residential developments occur outside the City core.
- Lake Street visually incoherent to downtown and Main Street. Many of Saint Albans retailers and employers are located on Lake Street but are "disconnected" from downtown. Physical improvements and

pedestrian connection along Lake Street can expand downtown's reach.

- While there is plenty of parking in downtown Saint Albans, there are parking problems. Most parking, other than on-street, is private or limited to a single use, resulting in a great deal of vacant parking spaces at various times of the day. The parking lots that do exist are poorly maintained, lack adequate signage, and do not have sufficient pedestrian connections to Main and other streets.
- Saint Albans has a great deal to offer the local community as well as the region, but there has been very little external marketing of the community. This tends to foster a perception that there is little to see and do here. To the contrary, downtown, Saint Albans, Lake Champlain, recreation, farmers market, Maple Festival, and agritourism are all tremendous assets, just to name a few. Current promotions focus primarily on the Maple Festival and little else.

3.0 Market Analysis

This chapter presents the findings of the market research for downtown Saint Albans. It provides detailed analyses that can be used to recruit new businesses, expand existing retail sectors, help existing businesses target new customers, and develop and refine a marketing strategy. This information is more important now than ever as Saint Albans for the Future and the City of Saint Albans continue their revitalization efforts.

Arnett Muldrow's methodology is designed to provide a snapshot of retail trade patterns in the community. From these supply side analyses, a number of conclusions can be made. Because it is a snapshot, this study does not necessarily reflect the exact trade patterns that each individual business might see through the course of the year and does not substitute for thorough market research for any specific business. However, the information provided does offer valuable insight into the overall patterns, retail trade areas, and visitor traffic for downtown Saint Albans.

This chapter is divided into two parts. The first describes the zip code survey analysis and definition of the market. The second section provides two retail analyses; retail leakage and retail shares.

3.1 Market Definition

Before beginning the market analysis, the retail trade areas for downtown have to be established. In order to define this market, a zip code survey of customers must be held by downtown businesses during a one-week period. This data is critical to the remainder of the market study. While this exercise lays the groundwork for defining the local trade areas and subsequent leakage and shares analyses, it also provides some insight into the overall visitor market.

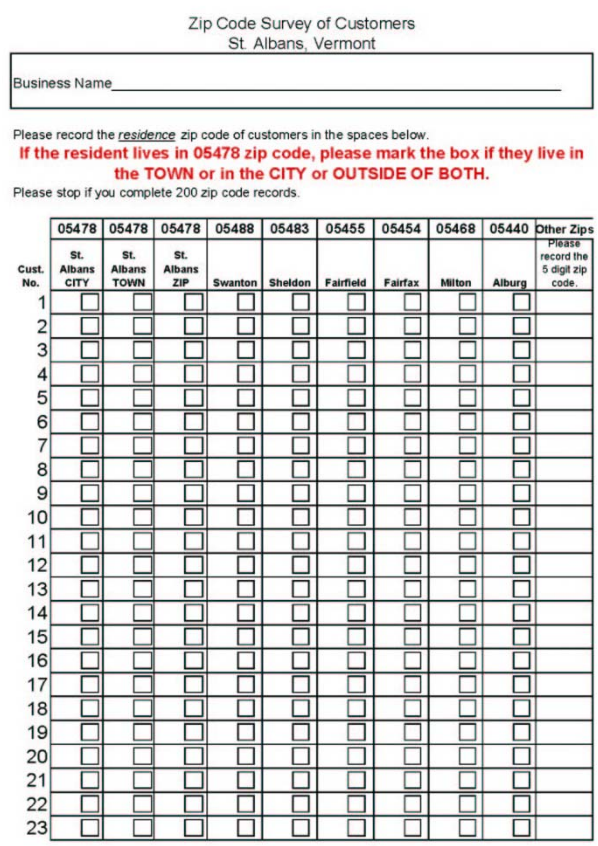
During the week from July 29, 2005 to August 5th, thirty-one individual downtown businesses participated in the zip code survey. These businesses formed the basis of the market definition analysis. One of the purposes of this exercise is to determine where downtown customers are coming from, and does not necessarily matter what specific types of businesses participate in the survey. Still, some businesses have more visitor traffic than others, so it is important to try and get a variety of retail types to participate. A better variety can also help us better determine browsing patterns.

In Saint Albans, the following types of businesses participated:

- Restaurants
- Gifts
- Men's Apparel
- Women's Apparel
- Family Apparel
- Children's Apparel
- Pharmacy
- Music
- Grocery/market
- Computer service
- Sporting Goods
- Jewelry
- Confectioner
- Art Gallery & framing
- Books
- Hobby & Toys
- Florist
- Bridal
- Antiques
- Consignment
- Yoga

During the survey period, businesses were provided with a form to record zip codes and asked to keep a log of their customers. Each business recorded all customers through the end of the week or 200 customers; whichever came first. Typically, the primary local zip code includes the community's municipal limits as well as unincorporated areas that may be either suburban or rural, but are still outside of the city limits. Because of the fact that the Saint Albans zip code (05478) includes Saint Albans City, Saint Albans Town, and other areas, customers residing in that zip were asked whether exactly in the zip code they live.

A sample of the survey instrument is shown below:



Zip Code Survey of Customers
St. Albans, Vermont

Business Name________________________________

Please record the *residence* zip code of customers in the spaces below.

If the resident lives in 05478 zip code, please mark the box if they live in the TOWN or in the CITY or OUTSIDE OF BOTH.

Please stop if you complete 200 zip code records.

	05478	05478	05478	05488	05483	05455	05454	05468	05440	Other Zips
Cust. No.	St. Albans CITY	St. Albans TOWN	St. Albans ZIP	Swanton	Sheldon	Fairfield	Fairfax	Milton	Alburg	Please record the 5 digit zip code.
1	☐	☐	☐	☐	☐	☐	☐	☐	☐	
2	☐	☐	☐	☐	☐	☐	☐	☐	☐	
3	☐	☐	☐	☐	☐	☐	☐	☐	☐	
4	☐	☐	☐	☐	☐	☐	☐	☐	☐	
5	☐	☐	☐	☐	☐	☐	☐	☐	☐	
6	☐	☐	☐	☐	☐	☐	☐	☐	☐	
7	☐	☐	☐	☐	☐	☐	☐	☐	☐	
8	☐	☐	☐	☐	☐	☐	☐	☐	☐	
9	☐	☐	☐	☐	☐	☐	☐	☐	☐	
10	☐	☐	☐	☐	☐	☐	☐	☐	☐	
11	☐	☐	☐	☐	☐	☐	☐	☐	☐	
12	☐	☐	☐	☐	☐	☐	☐	☐	☐	
13	☐	☐	☐	☐	☐	☐	☐	☐	☐	
14	☐	☐	☐	☐	☐	☐	☐	☐	☐	
15	☐	☐	☐	☐	☐	☐	☐	☐	☐	
16	☐	☐	☐	☐	☐	☐	☐	☐	☐	
17	☐	☐	☐	☐	☐	☐	☐	☐	☐	
18	☐	☐	☐	☐	☐	☐	☐	☐	☐	
19	☐	☐	☐	☐	☐	☐	☐	☐	☐	
20	☐	☐	☐	☐	☐	☐	☐	☐	☐	
21	☐	☐	☐	☐	☐	☐	☐	☐	☐	
22	☐	☐	☐	☐	☐	☐	☐	☐	☐	
23	☐	☐	☐	☐	☐	☐	☐	☐	☐	

Figure 1: Zip Code Survey Instrument. Arnett Muldrow & Associates.

3.1.1 Zip Code Results

The results of the zip code survey are listed below.

- Survey was held July 29, 2005 through August 5, 2005
- 31 businesses in downtown participated
- 2536 individual visits were recorded by retail shops and restaurants during this survey period
- This represented customers from 243 unique zip codes.
- 30 Separate states were recorded including Vermont;

  (VT, MA, RI, NH, ME, CT, NJ, NY, PA, DE, MD, VA, WV. NC, GA, FL, TN, MS, OH, WI, MN, IL, KS, LA, TX, CO, AZ, CA, OR, WA).
- Seven foreign countries including two Canadian provinces were recorded; (Ontario, Quebec, South Africa, Ireland, Mexico, Italy, Dominican Republic, Australia)

The following tables show the results of the zip code survey as compared to peer communities in which Arnett Muldrow has performed similar analyses. While this analysis is somewhat uncontrolled due to the fact that the other communities may have had more or fewer businesses participate in the exercise (Saint Albans had 31 businesses versus and average of around 15-20 in other communities), it still gives a fair comparison of the visitor markets. Saint Albans, identified in red in both charts, falls within the range of those communities that experience a healthy amount of visitor traffic such as Leesburg, VA, Walhalla, SC, Aiken, SC, and Tryon, NC)

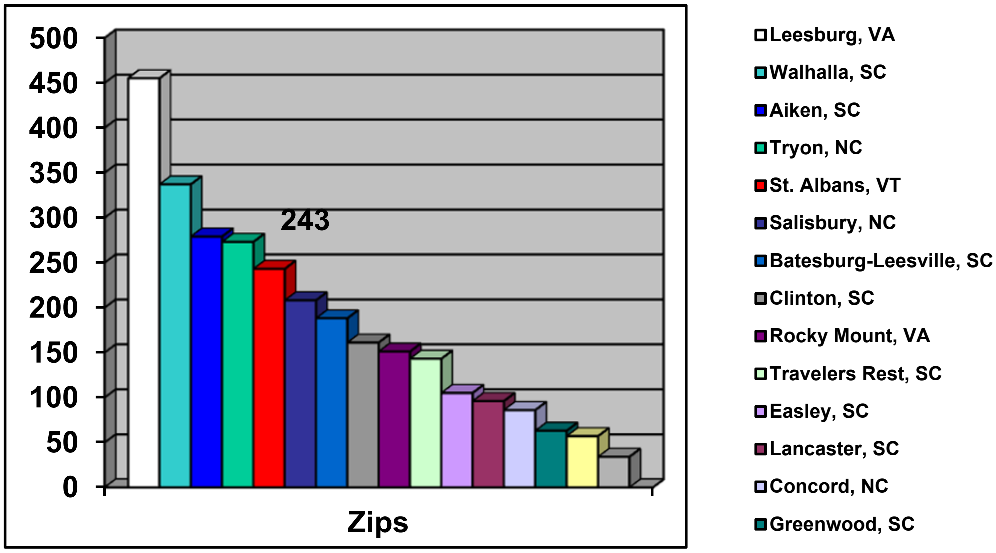


Figure 2: Comparison of unique zip codes recorded during zip code survey

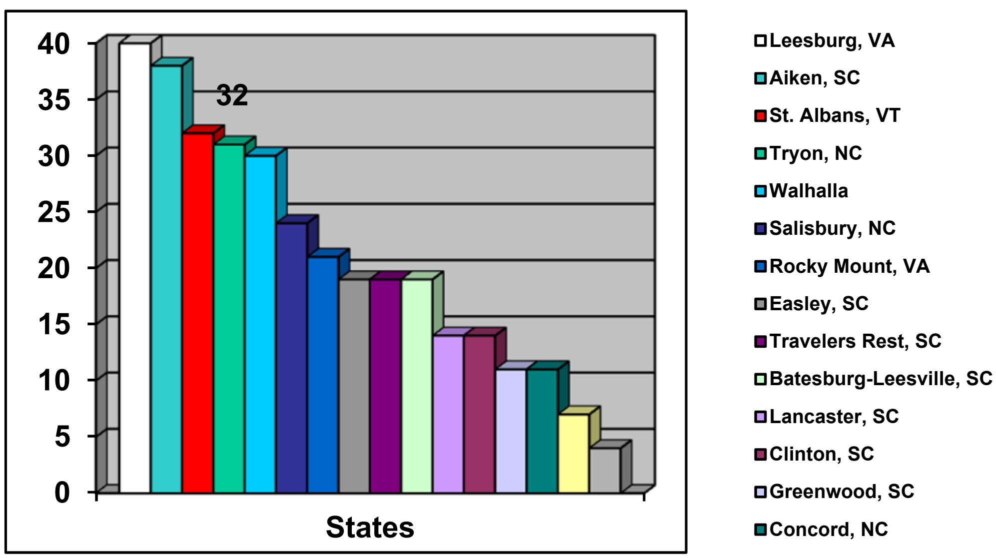


Figure 3: Comparison of unique states recorded during survey period

During the survey period:

- Approximately 43.4% of the customers came from the Saint Albans zip code – 05478.
- 28% of visits were from within the corporate limits of the City of Saint Albans and 12% came from the Town of Saint Albans.

- About 72% came from zip codes within the region and 17% from the rest of Vermont. The remaining 11% came from other states and countries.

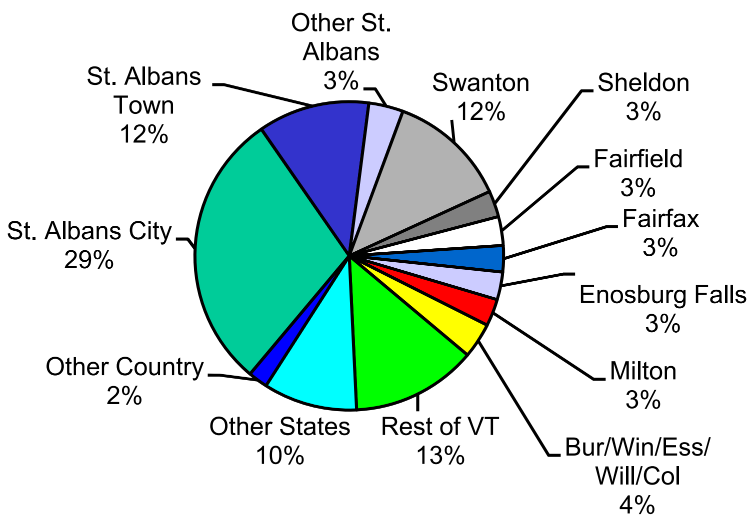


Figure 4:. Percentage of Customer Visits.

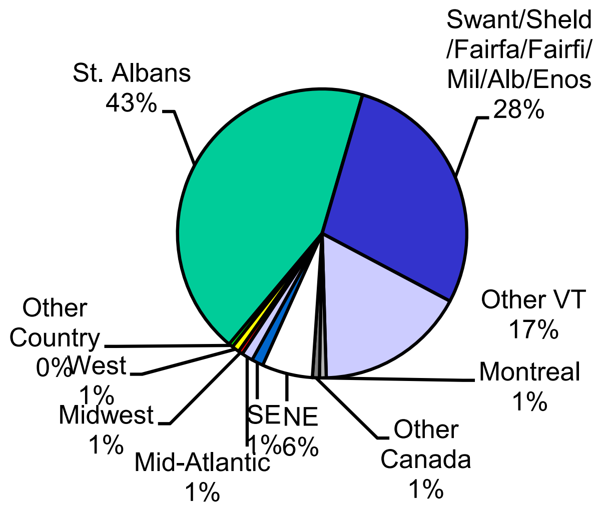


Figure 5: A Second Look. Percentage of Customer Visits

Different businesses had different patterns in terms of visitor penetration. Some were 100% local (all visits coming from Saint Albans and surrounding zips), while one had as little as 10% of its customers from the local area. Similar patterns were shown when looking at out of state customers as well as those from the Burlington area. No business had greater than 14% of its customer base from Burlington zips.

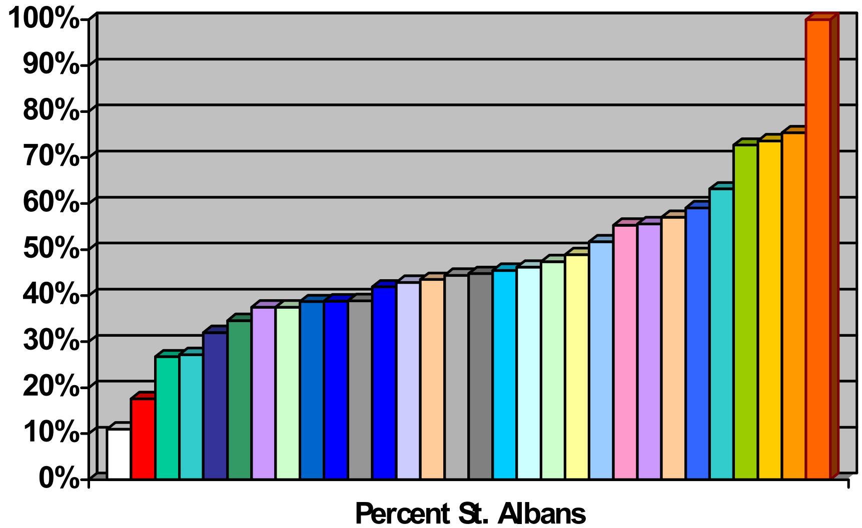


Figure 6: Percent of Customers from St. Albans Zip by individual business

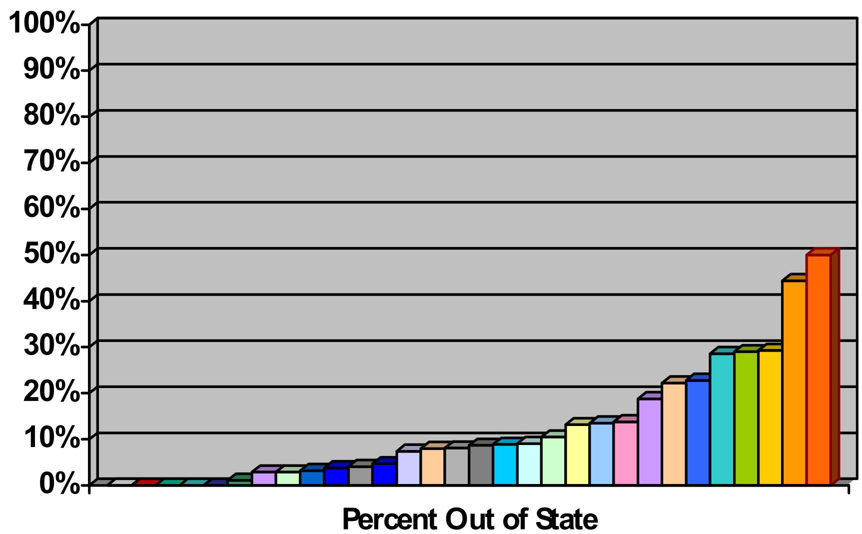


Figure 7: Percent of Customers from Out of State by individual business

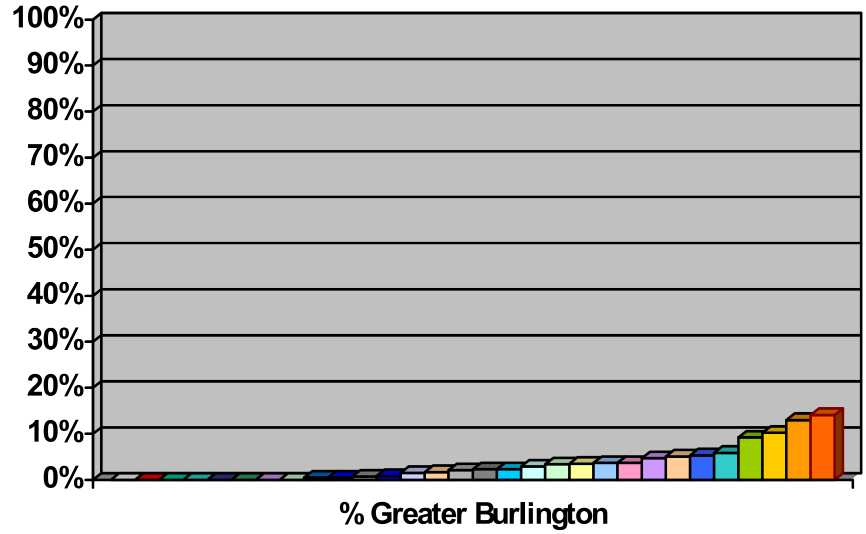


Figure 8: Percent of Customers from Greater Burlington by individual business

3.1.2 Trade Area Definitions

The zip code geography is used to define the primary and secondary trade areas. However, zip codes are each different sizes and populations and therefore cannot simply be analyzed by the number of visits per zip code. For example, there were 72 total visits from the Milton zip code (05468) compared to 77 from Fairfield (05455). However, the total population of the Milton zip is over fourteen times that of the population of the Fairfield zip code. There is a much deeper penetration into the Fairfield zip (relative to its population) than Milton. Therefore, the market penetration cannot be determined simply by the total number of visits, but by visits in relation to population.

The table below shows customer visits per 1,000 population for each of the highest representative zip codes.

Zip Code	City	St	Visits	Pop	Visits Per 1000 Residents	
05478 City	St. Albans	VT	744	7,516	99.0	Primary
05455	Fairfield	VT	77	887	86.8	Primary
05478 Zip	St. Albans/Georgia	VT	92	1,645	55.9	Primary
05478 Town	St. Albans/St. Albans Bay	VT	297	5,641	52.7	Primary
05483	Sheldon	VT	70	1,362	51.4	Primary
05488	Swanton	VT	318	7,688	41.4	Primary
05440	Alburg	VT	56	2,146	26.1	Secondary
05448	East Fairfield	VT	21	1,001	21.0	Secondary
05471	Montgomery Center	VT	15	878	17.1	
05454	Fairfax	VT	70	4,711	14.9	
05457	Franklin	VT	23	1,559	14.8	
05450	Enosburg Falls	VT	74	5,668	13.1	
05459	Highgate Center	VT	25	2,133	11.7	

05474	North Hero	VT	10	920	10.9
05476	Richford	VT	25	2,804	8.9
05468	Milton	VT	72	12,576	5.7
	Burlington	VT	36	37,949	0.9
12901	Plattsburgh	NY	22	33,649	0.7

Figure 9: Customer visits per 1000 Population

Because the number and type of participating businesses vary from community to community, there is no specific number that determines the primary and secondary trade areas. However, when comparing visits per 1000 population in relation to the specific time frame in which the survey was conducted, breaks in the visits/1000 will begin to emerge. Whenever these breaks become significant, this determines the differences in trade areas.

By this measure, downtown Saint Albans' primary retail trade area is defined as the following four zip code geographies. These zip codes had over fourty-one customer visits per thousand residents in each area.

- Saint Albans City 05478
- Fairfield 05455
- Saint Albans zip/Georgia 05478
- Saint Albans Town 05478
- Sheldon 05483
- Swanton 05488

Customers from these zip codes represented 63% of the total visits during the survey period.

Two additional zip codes listed in the preceding table had over twenty-one visits per thousand residents. These geographies represent downtown Saint Albans' secondary trade area:

- Alburg 05440
- East Fairfield 05448

Customers from these zips represented 3% of the total visits during the survey period.

The map below illustrates the primary and secondary trade areas for downtown Saint Albans. The orange area is the primary trade area (PTA) and the purple is the secondary trade area (STA).

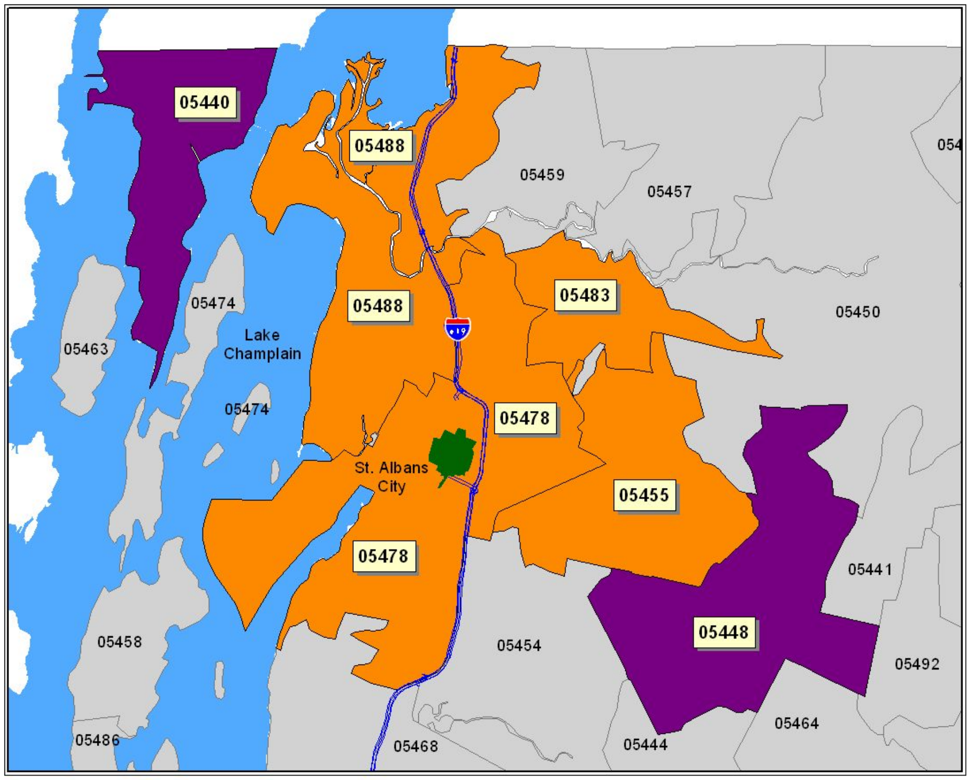


Figure 10: Downtown Saint Albans' Primary and Secondary Trade Areas

These figures indicate that downtown retailers have a solid capture of customers located in Franklin County, and that the secondary trade area is pulling both to the northwest and southeast.

3.1.3 Market Definition Conclusions

These conclusions are based on the market definition and demographic information gathered above:

- Saint Albans' downtown has primarily a local market. 66% of its customer base comes the primary and secondary trade areas with 90% of all its customers coming from Vermont. This is not uncommon to downtowns and points to the fact that Saint Albans can never ignore its local, bread-and-butter market.
- On the other hand, Saint Albans seems to have a rather healthy visitor market as compared to peer communities in other states. Approximately 28% of Saint Albans' base comes from outside the immediate area. This percentage varies widely from shop to shop. Individual businesses non- Saint Alban zip code base ranges from 10% at the low end to 100% at the upper end, representing a business that is entirely local. Most businesses seem to have an average of 40% to 50% of their customers coming from the primary Saint Albans zip.
- Most businesses have less than 10% of their customer base coming from out of state, while seven saw greater than 20% coming from outside of Vermont. All in all, Saint Albans seems to have potential for enhanced tourism activity as evidenced by the breadth of visits to the community. Of course, this particular survey was taken during summer and one would assume that the visitor market would be substantially less in the winter months but higher in the fall.
- Although still within the primary trade area, there is a significant drop off of customers from those living in the City of Saint Albans versus those in the Town of Saint Albans. City residents account for 28% of all customer visits while Town residents represent only 12%. This begins to confirm some observations from the stakeholder interviews – that Town residents, for whatever reason, are not shopping in downtown and that they may not have a real "connection" to Saint Albans City. Downtown Saint Albans is the only true downtown in the county and the primary employment center and should see more customers from its own zip code.

- Burlington is a Burlington has a considerable competitive retail market having a significant impact on Saint Albans trade areas. The Burlington market, as evidenced by the trade area map above, seems to be digging quite deep into the southern portion of the Saint Albans market. This is not atypical of a community adjacent to a more urban area, but marketing attention should be paid to capturing customers from the north Chittenden County region, particularly since many of these people are working in Saint Albans.
- By tracking unique zip codes, it is possible to tell if visitor “browsing” is occurring where a single person goes from shop to shop. Saint Albans seems to have a healthy amount of browsing occurring between food establishments, apparel stores, gifts, and books/music in particular. This is a testament to Saint Albans healthy visitor market as well as to the variety of visitor oriented retailers and restaurants. Cooperative marketing, improved wayfinding, and customer referrals can all help to improve visitor browsing.
- Still, as previously stated, the majority of Saint Albans customers are from Saint Albans and Franklin County. Any revitalization efforts should focus on the needs of these customers as well as enhancing the visitor market.
- Saint Albans is in a slow growth region. The 2005 population of the PTA is estimated at 24,739 representing a 3.6% increase since 2000. The PTA is expected to gain another 3.7% by the year 2010.
- When compared to then nearest competitive market of Burlington, the Sint Albans’ PTA has lower income levels and therefore consumer buying power. The 2005 Estimated Per capita income in the PTA is $21,286 compared with $26,060 for the Burlington MSA. Similarly, median household income is $46,964 in the PTA compared with $52,851 for the Burlington CBSA.

3.2 Retail Market Analysis

Downtown Saint Albans is a retail center serving the geographic markets defined above. In this section, downtown's retail market will be examined to identify potential opportunities for retail growth through two key studies:

1. A retail leakage analysis that will look at the primary and secondary trade areas to see how much money is "leaking" from the area to stores in other areas. From this, a "capture scenario" will be developed to illustrate how much retail space could potentially be brought back into Saint Albans City based on the demand in the market.

2. A retail shares analysis that examines performance of retail stores in downtown Saint Albans' trade area as a benchmark of the greater region.

There are approximately 250 retail establishments in downtown Saint Albans' primary trade area with combined annual sales of $341.2 million. These businesses employ 2,525 people. In downtown's secondary trade area there are 23 establishments with $12.3 million in sales. Secondary trade area retailers employ 91 people. The secondary trade area is quite rural in character, which accounts for the lower sales figures and number of establishments.

3.2.1 Retail Leakage Analysis

"Retail Leakage" refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by the stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside of the area are said to be "leaking". If a community is a major retail center with a variety of stores it will be "attracting" rather than "leaking" retail sales. Even large communities may see leakage in certain retail categories.

Such an analysis is not an exact science. In some cases large outflow may indicate that money is being spent elsewhere (drug store purchases at a Wal-Mart or apparel purchases through mail-order). It is important to note that this analysis accounts best for retail categories where households (rather than businesses) are essentially the only consumer groups. For example, hardware stores may have business sales that are not accounted for in consumer expenditures. Stores such as jewelry shops and clothing stores are more accurately analyzed using this technique.

3.2.1.1 Retail Leakage in the Primary and Secondary Trade Areas

For the retail leakage analysis, we look at selected retail categories specific to the downtown environment. For example, while the figures in the previous section represent all retail categories, this analysis would exclude retail types such as auto dealerships and related services, gas stations and convenience, and mail order sales, among others. These types of businesses are not relevant to the downtown environment.

Stores in the primary trade area (including 05478, 05455, 05483, 05488 zip codes) for downtown Saint Albans sold $169.5 million in merchandise for selected retail categories. Consumers who live in the PTA spent $181.5 million dollars in stores of similar type. The retail leakage analysis of the primary trade area suggests that overall downtown is *leaking* sales to the tune of $11.95 million dollars annually. An analysis looking at the secondary trade area (including 05440 and 05448) reveals a similar pattern. STA stores sold $7 million dollars while consumers spent $23.6 million representing a total leakage of $16.6 million.

This represents a large amount of leakage for the primary trade area, and in particular, the secondary trade area. While some of the secondary trade area leakage is coming into the primary trade area, more likely it is going to the primary regional retail center of Burlington and other areas.

It should also be noted that while there is a large amount of leakage, this could be a significant amount of opportunity to improve downtown's market if some of those leaking dollars are captured back into the St. Albans Market.

The table on the following page details the consumer expenditures, retail sales, and inflow/outflow of dollars in the community and begins to outline the opportunity for retail growth in Saint Albans.

Retail Leakage Report for Selected Retail Categories

	Sales	Sales	Expenditures		Leakage (Inflow)		
	PTA	STA	PTA	STA	PTA	STA	Net
ALL RETAILING (SIC 52-59)	$ -	$ -					
SELECTED RETAIL CATEGORIES BELOW	$ 169,500,000	$ 7,000,000	$ 181,450,000	$ 23,600,000	$ 11,950,000	$ 16,600,000	$ 28,550,000
BUILDING MATERIAL AND SUPPLY	$ 20,600,000	$ -	$ 7,429,000	$ 1,060,000	$ (13,171,000)	$ 1,060,000	$(12,111,000)
HARDWARE STORES	$ 3,400,000	$ 800,000	$ 834,000	$ 116,000	$ (2,566,000)	$ (684,000)	$ (3,250,000)
DEPARTMENT STORES	$ 45,900,000	$ -	$ 25,355,000	$ 3,289,000	$ (20,545,000)	$ 3,289,000	$(17,256,000)
GROCERY STORES	$ 34,400,000	$ 2,700,000	$ 58,876,000	$ 7,635,000	$ 24,476,000	$ 4,935,000	$ 29,411,000
APPAREL AND ACCESSORY STORES	$ 6,100,000	$ -	$ 17,060,000	$ 2,181,000	$ 10,960,000	$ 2,181,000	$ 13,141,000
SHOE STORES	$ 2,400,000	$ -	$ 2,197,000	$ 280,000	$ (203,000)	$ 280,000	$ 77,000
FURNITURE STORES	$ 2,600,000	$ 900,000	$ 5,378,000	$ 724,000	$ 2,778,000	$ (176,000)	$ 2,602,000
HOME FURNISHINGS	$ 1,200,000	$ -	$ 3,613,000	$ 500,000	$ 2,413,000	$ 500,000	$ 2,913,000
HOUSEHOLD APPLIANCE STORES	$ 8,700,000	$ -	$ 1,482,000	$ 201,000	$ (7,218,000)	$ 201,000	$ (7,017,000)
RADIO TV CONSUMER ELECT	$ -	$ 1,200,000	$ 2,824,000	$ 366,000	$ 2,824,000	$ (834,000)	$ 1,990,000
EATING AND DRINKING PLACES	$ 31,100,000	$ 600,000	$ 30,214,000	$ 3,859,000	$ (886,000)	$ 3,259,000	$ 2,373,000
EATING PLACES	$ 30,500,000	$ 600,000	$ 29,000,000	$ 3,704,000	$ (1,500,000)	$ 3,104,000	$ 1,604,000
DRINKING PLACES (ALCOHOLIC BEV.)	$ 600,000	$ -	$ 1,214,000	$ 155,000	$ 614,000	$ 155,000	$ 769,000
DRUG STORES & PROPRIETARY STORES	$ 6,800,000	$ -	$ 14,401,000	$ 1,875,000	$ 7,601,000	$ 1,875,000	$ 9,476,000
SPORTING GOODS & BICYCLE STORES	$ 1,600,000	$ -	$ 2,166,000	$ 275,000	$ 566,000	$ 275,000	$ 841,000
BOOK STORES	$ 400,000	$ -	$ 2,461,000	$ 313,000	$ 2,061,000	$ 313,000	$ 2,374,000
JEWELRY STORES	$ 300,000	$ -	$ 2,231,000	$ 283,000	$ 1,931,000	$ 283,000	$ 2,214,000
HOBBY, TOY, AND GAME SHOPS	$ 600,000	$ -	$ 2,023,000	$ 261,000	$ 1,423,000	$ 261,000	$ 1,684,000
CAMERA/PHOTOGRAPHIC SUPPLY	$ -	$ -	$ 243,000	$ 31,000	$ 243,000	$ 31,000	$ 274,000
GIFT, NOVELTY, AND SOUVENIR	$ 1,200,000	$ 800,000	$ 1,706,000	$ 222,000	$ 506,000	$ (578,000)	$ (72,000)
LUGGAGE AND LEATHER GOODS	$ 100,000	$ -	$ 191,000	$ 24,000	$ 91,000	$ 24,000	$ 115,000
NEEDLEWORK AND CRAFT STORES	$ 1,000,000	$ -	$ 364,000	$ 50,000	$ (636,000)	$ 50,000	$ (586,000)
FLORISTS	$ 1,100,000	$ -	$ 402,000	$ 55,000	$ (698,000)	$ 55,000	$ (643,000)
MUSIC	$ 2,600,000	$ -	$ 990,000	$ 132,000	$ (1,610,000)	$ 132,000	$ (1,478,000)

Figure 11: Retail Leakage by Category in Downtown Saint Albans' Primary and Secondary Trade Areas. Source: Claritas, Inc.

3.2.1.2 Market Potential Analysis

It would not be realistic to expect Saint Albans to recapture all of the leaking sales from the various retail categories. People will always go to other places to get certain items, or will purchase them in transit to and from work. Therefore, we must look at a potential capture scenario that might illustrate a reasonable potential for additional retail should some of the lost revenues be captured in the categories where retail leakage exists.

The table on the following page illustrates the new or expanded retail space that could be supported in Saint Albans by capturing these sales under a scenario where 20% of leakage from the primary trade area (one in every five dollars) is captured and 10% of the leakage from the secondary trade area (one in every ten dollars) is captured. The sales per square foot for retail store types have been obtained from Dollars and Cents of Shopping Centers, published by the Urban Land Institute.

Capture Scenario for Selected Retail Categories

	20% of PTA Outflow	10% of STA Outflow	Potential Capture	Sales Per Square Foot	Calculated Capture
ALL RETAILING (SIC 52-59)	$ -		$ -		
SELECTED RETAIL CATEGORIES BELOW					55,513
BUILDING MATERIAL AND SUPPLY	$ (2,634,200)	$ 106,000	$ (2,528,200)	$ 142.38	
HARDWARE STORES	$ (513,200)	$ (68,400)	$ (581,600)	$ 121.08	
DEPARTMENT STORES	$ (4,109,000)	$ 328,900	$ (3,780,100)	$ 133.90	
GROCERY STORES	$ 4,895,200	$ 493,500	$ 5,388,700	$ 371.79	14,494
APPAREL AND ACCESSORY STORES	$ 2,192,000	$ 218,100	$ 2,410,100	$ 164.60	14,642
SHOE STORES	$ (40,600)	$ 28,000	$ (12,600)	$ 158.81	
FURNITURE STORES	$ 555,600	$ (17,600)	$ 538,000	$ 141.84	3,793
HOME FURNISHINGS	$ 482,600	$ 50,000	$ 532,600	$ 167.75	3,175
HOUSEHOLD APPLIANCE STORES	$ (1,443,600)	$ 20,100	$ (1,423,500)	$ 245.44	
RADIO TV CONSUMER ELECT	$ 564,800	$ (83,400)	$ 481,400	$ 207.17	2,324
EATING AND DRINKING PLACES	$ (177,200)	$ 325,900	$ 148,700	$ 201.63	737
EATING PLACES	$ (300,000)	$ 310,400	$ 10,400	$ 201.63	52
DRINKING PLACES (ALCOHOLIC BEV.)	$ 122,800	$ 15,500	$ 138,300	$ 88.07	1,570
DRUG STORES & PROPRIETARY STORES	$ 1,520,200	$ 187,500	$ 1,707,700	$ 247.29	6,906
SPORTING GOODS & BICYCLE STORES	$ 113,200	$ 27,500	$ 140,700	$ 153.46	917
BOOK STORES	$ 412,200	$ 31,300	$ 443,500	$ 161.16	2,752
JEWELRY STORES	$ 386,200	$ 28,300	$ 414,500	$ 263.92	1,571
HOBBY, TOY, AND GAME SHOPS	$ 284,600	$ 26,100	$ 310,700	$ 146.28	2,124
CAMERA/PHOTOGRAPHIC SUPPLY	$ 48,600	$ 3,100	$ 51,700	$ 542.63	95
GIFT, NOVELTY, AND SOUVENIR	$ 101,200	$ (57,800)	$ 43,400	$ 168.55	257
LUGGAGE AND LEATHER GOODS	$ 18,200	$ 2,400	$ 20,600	$ 198.82	104
NEEDLEWORK AND CRAFT STORES	$ (127,200)	$ 5,000	$ (122,200)	$ 74.91	
FLORISTS	$ (139,600)	$ 5,500	$ (134,100)	$ 149.82	
MUSIC	$ (322,000)	$ 13,200	$ (308,800)	$ 149.82	

Figure 12: 20/10 Capture Scenario for Downtown Saint Albans. Source: Claritas & Dollars and Cents of Shopping Centers.

Based on this scenario table, Saint Albans could support 55,513 of additional retail space. Clearly, certain store types can be supported such as:

- Grocery stores
- Apparel stores: this category includes all apparel stores including children's, women's, men's, and shoes.
- Furniture and home furnishings
- Book stores: this category includes new book stores and used book stores.
- Drug and variety stores: this includes pharmacies and limited scale retail stores similar to "Family Dollar" and "Dollar General"
- Radio, TV and consumer electronics
- Hobby, toy and game shops

Additionally, several other demand indicators might help existing businesses expand their merchandise mix to attract shoppers who are otherwise going somewhere else to buy these products.

3.2.2Retail Shares Analysis

Retail shares analysis compares Saint Albans' Primary Trade Area businesses as a proportion of a larger region. This in turn, is used to benchmark selected retail categories to determine if particular retail types are under performing, representing an opportunity for expansion, or performing exceptionally well, representing an opportunity for clustering additional related businesses around a strength.

For the purposes of this study, Saint Albans' primary trade area was compared to a two county region that includes Franklin and Chittenden. This region was chosen to encompass all of the primary competitive retail markets in the region, particularly the greater Burlington area. While part of the secondary trade area, Grand Isle was excluded from the study area due to the fact that there is very little retail in that county.

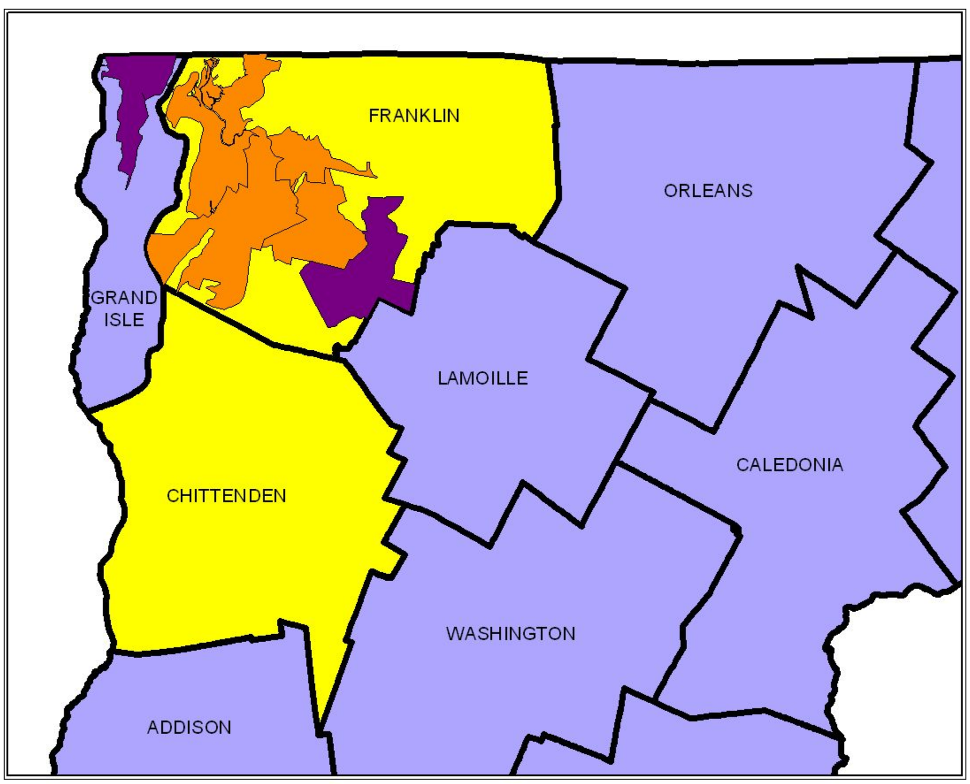


Figure 13: Shares analysis study area

Selected Results

There are 250 businesses located in downtown's primary trade area amounting to sales of 341 million dollars. The region has 2008 business establishments accounting for 2.9 billion dollars. Businesses in the primary trade area therefore account for a 11.7% share of all retail within the region.

	St. Albans PTA	Region	Percent Share
ALL RETAILING	**341.2**	**2914.8**	**11.7%**
HARDWARE STORES	3.4	114	3.0%
MEAT AND FISH MARKETS, FREEZER PROV	0	6.9	0.0%
FRUIT AND VEGETABLE MARKETS	0	4.6	0.0%
DAIRY PRODUCTS STORES	0	0.5	0.0%
RETAIL BAKERIES	0.1	9.4	1.1%
MISCELLANEOUS FOOD STORES	4	117.1	3.4%
MEN'S AND BOY'S CLOTHING STORES	0	5.3	0.0%
WOMEN'S ACCESSORY & SPECIALTY	0	2.6	0.0%
CHILDREN'S AND INFANTS' WEAR	0	5.5	0.0%
MISC APPAREL AND ACCESSORIES	0	11.8	0.0%
FURNITURE/HOME FURNISHINGS STORE	4.2	96.7	4.3%
FURNITURE STORES	2.6	55.2	4.7%
FLOOR COVERING STORES	0.4	23.2	1.7%
RADIO, TV, CONSUMER ELECTRONICS	8.6	182.9	4.7%
COMPUTER/COMPUTER SOFTWARE STORES	4.7	124.5	3.8%
LIQUOR STORES	0.5	12.3	4.1%
SPORTING GOODS & BICYCLE STORES	1.6	39.9	4.0%
BOOK STORES	0.4	8.5	4.7%
JEWELRY STORES	0.3	6.5	4.6%
HOBBY, TOY, AND GAME SHOPS	0.6	27	2.2%
CAMERA/PHOTOGRAPHIC SUPPLY	0	3.7	0.0%
GIFT, NOVELTY, SOUVENIR	1.2	20.9	5.7%
TOBACCO STORES AND STANDS	0	1	0.0%
NEWS DELAERS AND NEWSSTANDS	0	0	0.0%
PET SHOPS	0	20.4	0.0%

Figure 14: Shares Analysis for Primary Trade Area and Region. Source: Claritas, Inc.

Similar to the leakage analysis, the shares analysis points to a number of opporunities to grow in certain retail sectors. In the shares analyses strong performers include

- Nurseries and garden supply 24.8%
- General Merchandising 19.2%
- Household Appliances 35.8%
- Sewing/Needlework 21.7%
-

Each of these were performing above the respective benchmarks (of 11.7% While they are performing well, none of these categories are retail types in which to build a retail cluster around.

Weaker performers in the trade areas are shown in the table on the preceding page, and include:

- Hardware Stores
- Specialty Foods such as meat, fish, fruit & vegetable markets; dairy & bakeries
- Apparel stores including children's, women's, men's clothing
- Furniture and Home furnishings
- Targeted retailing such as books, jewelry, hobby & toy, gifts, sporting goods, and pet shops

These categories were performing below the 11.7% benchmark. These all represent areas where Saint Albans has the opportunity gain market share to place it on par with the surrounding region.

3.3 Market Analysis Conclusions

- St. Albans is leaking sales in total and in virtually every meaningful category. This translates into a potential capture of 55,000 square feet of additional retail space that can be directed towards downtown. The biggest opportunities to recruit retail exist with all categories of apparel stores, furniture & home furnishings, books, hobby, and drug stores. Based on the data, there is opportunity for many other existing retail businesses to expand.

- Without a concerted marketing effort to attract customers, however, leakage numbers would continue to follow present patterns. St. Albans downtown must do a better job of retaining the customer base, particularly those from outside the city limits in Saint Albans Town. To that end, Saint Albans City and Saint Albans Town should look to cooperate on an overall marketing and economic development strategy.

- Targeted retail with "crossover" appeal between residents and visitors will be a key to success of downtown. This is evidenced by the amount of browsing noted in the zip code survey by these types of establishments. This "crossover" is particularly important in Saint Albans considering the seasonal nature of the visitor and tourism market.

- In terms of the regional market, Saint Albans must define itself as a retail destination for the north Chittenden County growth area. Regional residential growth is concentrated here and commuting patterns show Chittenden residents coming into Saint Albans each day for work. Without establishing itself, particularly to new residents of this area, Saint Albans risks losing a potential market to the greater Burlington area.

- Ultimately, downtown should be marketed as a residential alternative in order to create a more vibrant urban core as well as build a more diverse immediate market for downtown retailers.

- Retail recruitment and development of existing businesses will be important to the revitalization of downtown Saint Albans. Also, physical improvements to the downtown environment are critical to the success of downtown at every level from recruiting businesses, development market rate housing, as well as marketing of events and downtown as a whole.

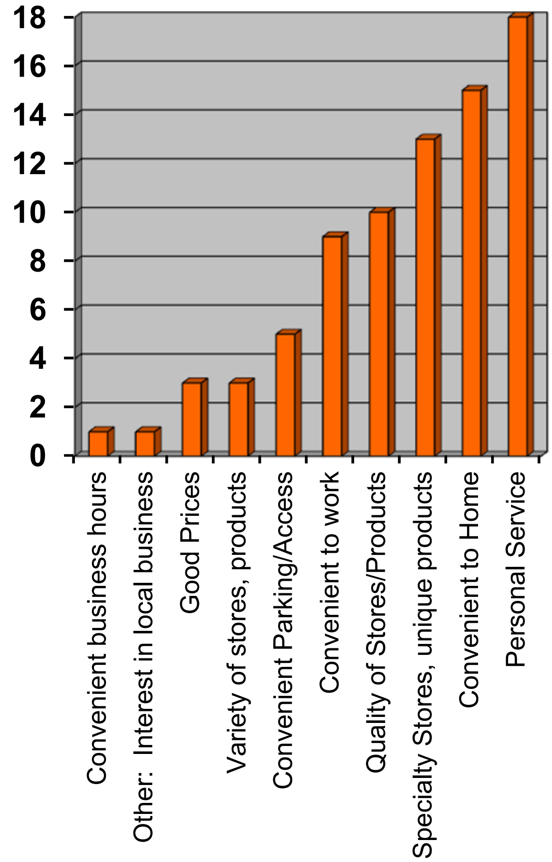
- By celebrating and promoting its history and agricultural heritage, Saint Albans may be able establish an agritourism base while also creating a retail niche. The most successful events in Saint Albans right now tend to be food theme based (Maple Festival, Farmers Market). By creating a link between this agricultural heritage, Saint Albans History, and the arts market, Saint Albans can build its own unique creative economy.

4.0 Survey of Businesses

As a supplement to this market analysis, a survey of existing business in downtown was conducted not only to determine their specific needs, but also to learn of their perceptions of their customer's needs and desires. Twenty-four businesses took time out to complete the survey. A copy of the survey instrument is available in the appendix of this document. Selected results of this survey are presented below.

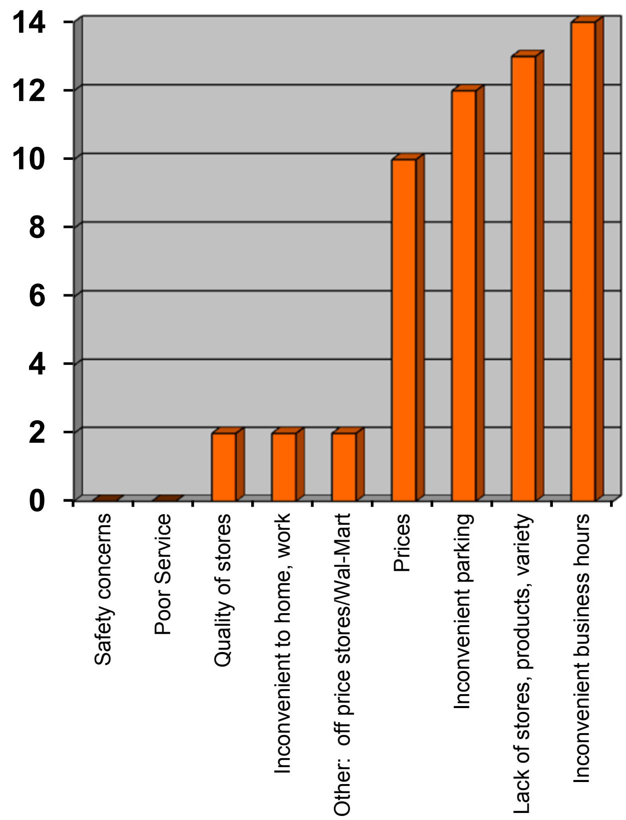
4.1 Why do customers shop downtown?

Personal service was the key reason that merchants thought customers shopped in downtown shops. This thought is not uncommon since downtown shops are typically locally owned and do offer better customer service. Convenience to home and specialty stores ranked second and third respectively. Good prices, variety, and convenient hours ranked lowest in the survey.


18
16
14
12
10
8
6
4
2
0
Convenient business hours
Other: Interest in local business
Good Prices
Variety of stores, products
Convenient Parking/Access
Convenient to work
Quality of Stores/Products
Specialty Stores, unique products
Convenient to Home
Personal Service

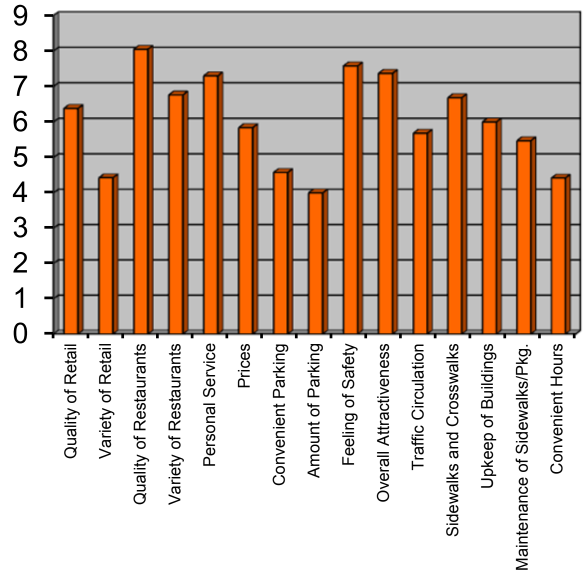
4.2 Why don't customers shop downtown?

Similar to the prior question, hours, lack of stores and variety, and parking ranked the highest. Prices also ranked high as a reason shoppers don't come downtown Saint Albans to shop. The service, safety and quality were not prominent reasons that people did not shop downtown according the participating merchants.



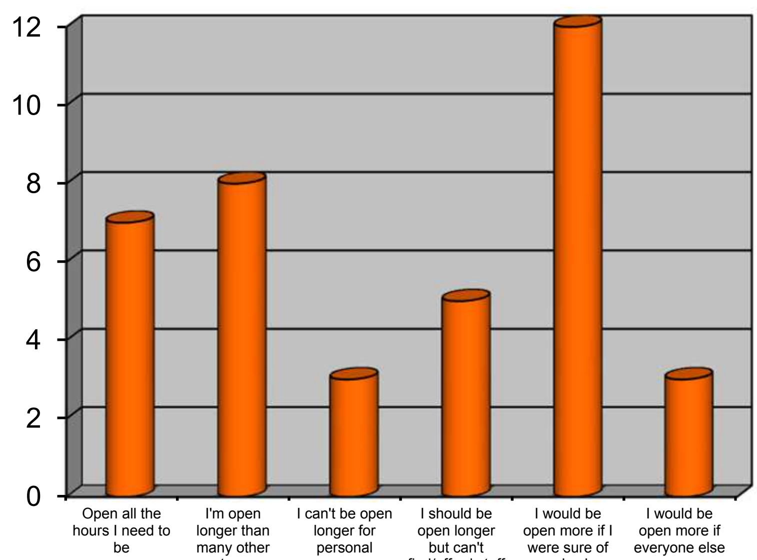
4.3 Ranking of downtown conditions?

Merchants were asked to rank the conditions of downtown on a scale of one to ten. The scores ranged from a rank of four for the amount parking to a high of eight for the quality of restaurants downtown. The quality of service, safety, and overall attractiveness of downtown each ranked over seven while variety of stores, convenient hours, and convenient parking ranked below a five.



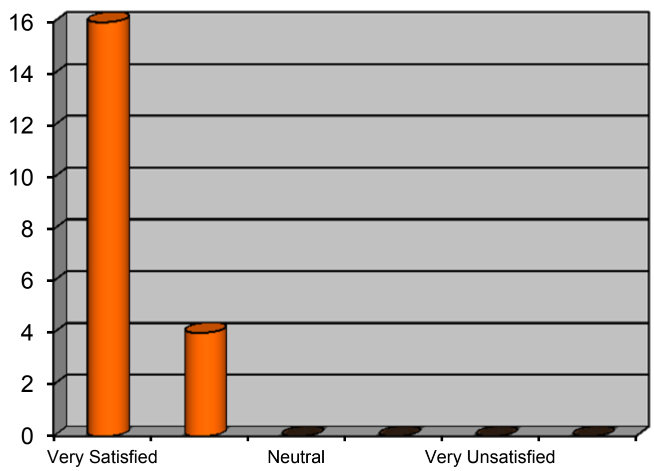
4.4 What are your thoughts on store hours?

Although the merchants ranked store hours as a concern, many were reluctant to pursue longer hours. Nearly half of the respondents expressed that they would be open longer if they could be assured of sales. Eight respondents said that they were open longer than many other stores downtown and seven said that they were open all of the hours that they needed to be.



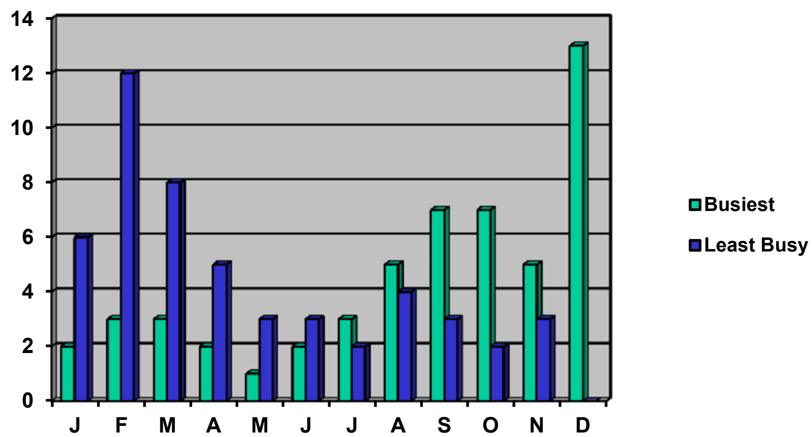
4.5 Are you satisfied with your store location?

The vast majority of respondents indicated that they were very satisfied or somewhat satisfied with their store location. This is a very positive indicator for downtown Saint Albans suggesting that stores felt comfortable where they were even while acknowledging the need for improvements.



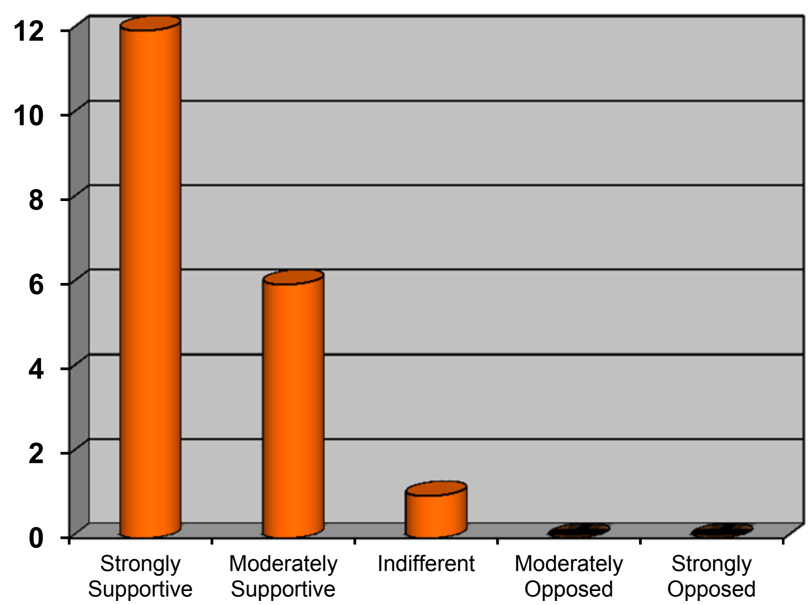
4.6 What are your busiest and least busy months?

Shopkeeper felt that the fall months leading up to December were the busiest months of the year with December clearly the top busiest month for business. Likewise, February and March were the slowest months for businesses downtown.



4.7 Do you support the community's efforts to attract more business, shoppers, events, and activities into downtown?

Again, the vast majority of respondents indicated that they were supportive of the community's efforts to attract more shoppers and activity to downtown. Only one business was "indifferent" to the efforts and none were opposed.

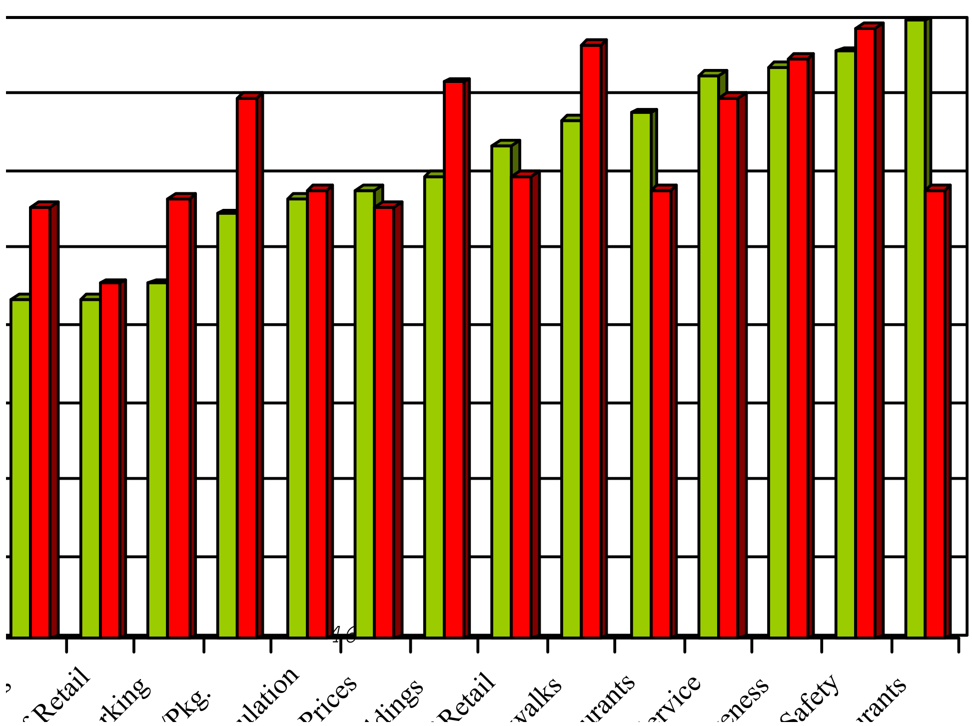


5.0 Survey of Customers

In November of 2005, the project team conducted a statistical sample telephone survey of Saint Albans area residents to ask them questions regarding their thoughts for downtown. Four hundred eight area residents were surveyed which provides a margin of error for the data of plus or minus five percent. The respondents were asked a series of twenty-four questions, which provided the project, team nearly forty-four separate data points. When filtered by demographic and other respondent information, the data could easily yield many hundreds of data points not including the open ended qualitative questions also included in the survey. As a result, a selection of the most salient points for this study is included below. The survey instrument is included as an appendix to this report and the complete results of the survey are included in a separate document for future reference.

5.1 Ranking of downtown conditions

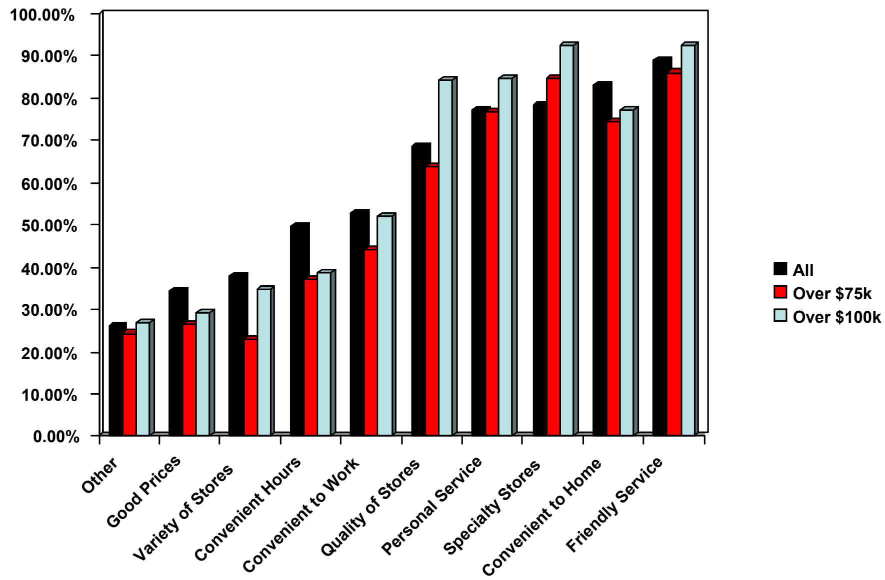
The chart below shows the merchant rankings of downtown (shown in green) compared with that of the surveyed customers (shown in red). Customers ranked safety, sidewalks and crosswalks, and overall attractiveness the highest. They did not give the quality of restaurants the highest ranking. Variety of retail was the customers lowest ranking



result followed by prices. The hours and amount of parking did not rank as low for customers as they did for merchants.

5.2 Why do you shop downtown?

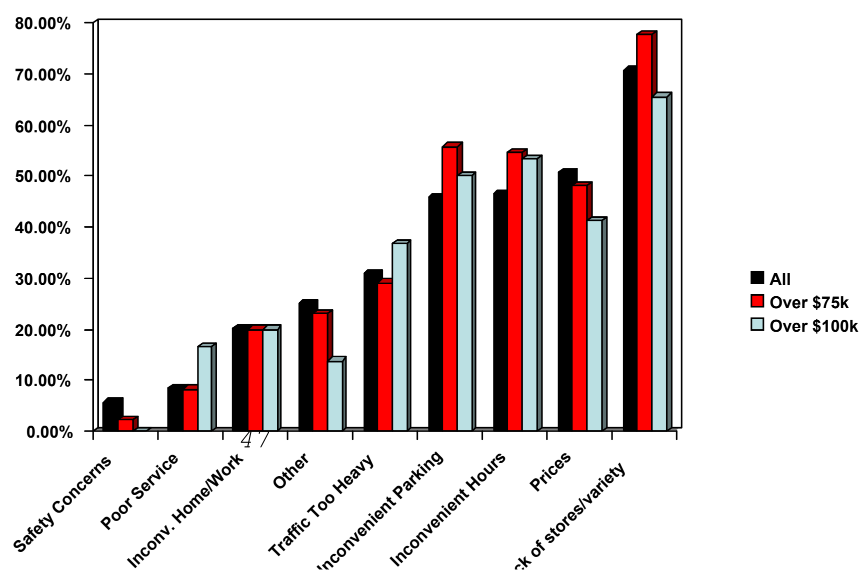
Friendly service and convenience ranked the highest for all respondents to the survey. Those earning over $100,000 per year ranked specialty stores as the number one reason they shopped downtown. Prices, variety, and convenient hours ranked the lowest



which is similar to the results shown in the merchant survey.

5.3 Why don't you shop downtown?

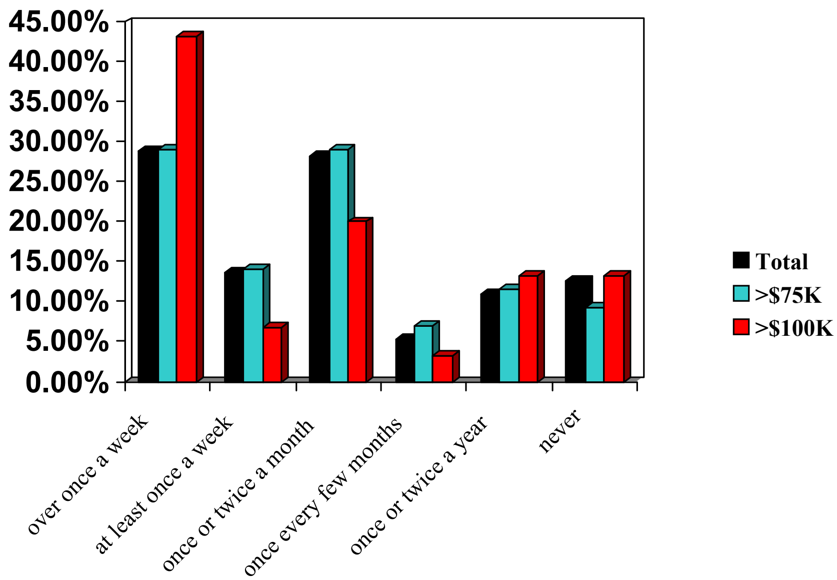
Lack of variety was the number one reason for all respondents for why



they do not shop downtown Saint Albans followed by a distant second of prices and inconvenient hours. Poor service and safety were not significant concerns.

5.4 How often do you shop downtown?

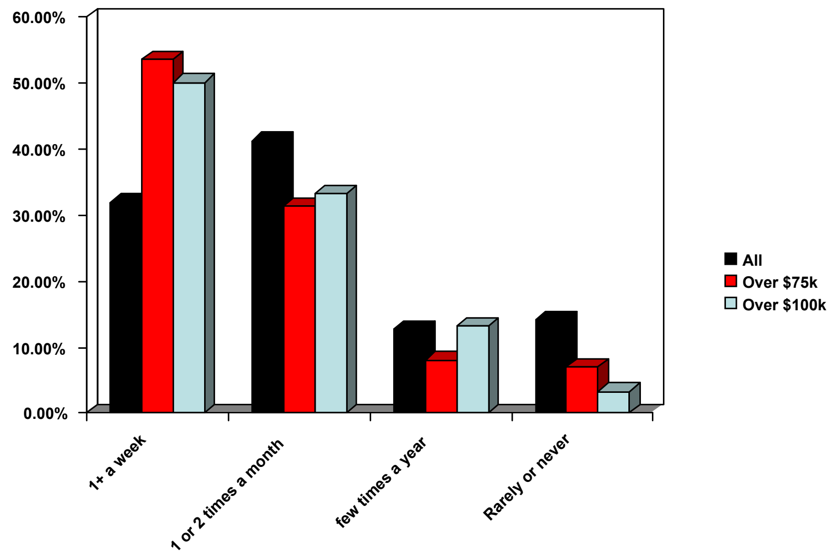
Nearly 70% of the respondents to the survey shopped in downtown Saint Albans at least once a month with nearly one customer in every three shopping downtown over once a week. This number increased to



43% for those who earned over $100,000 per year.

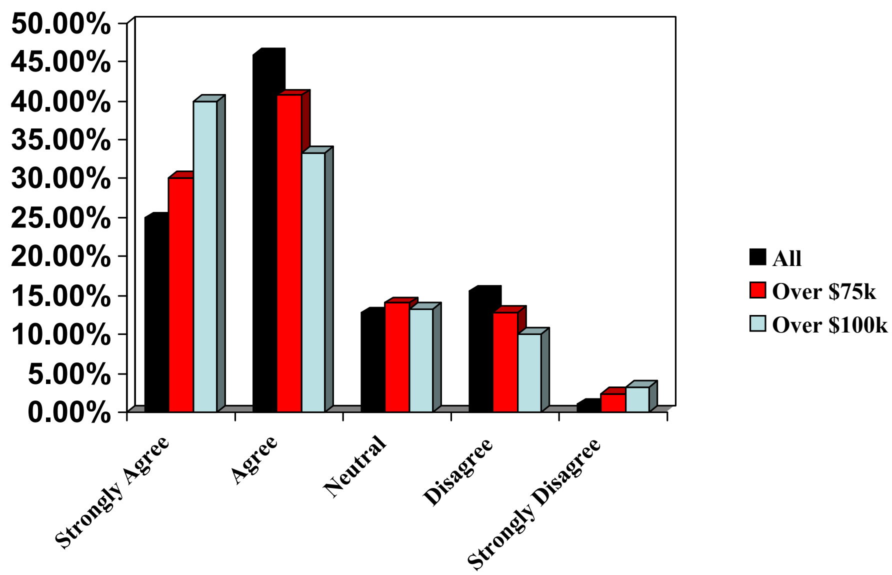
5.5 How often do you shop in Chittenden County?

Over 70% of the customers also indicated that they shopped in Chittenden County over once a month. This number increased to over 80% for those earning over $75,000 per year.



5.6 Downtown is the heart of the community

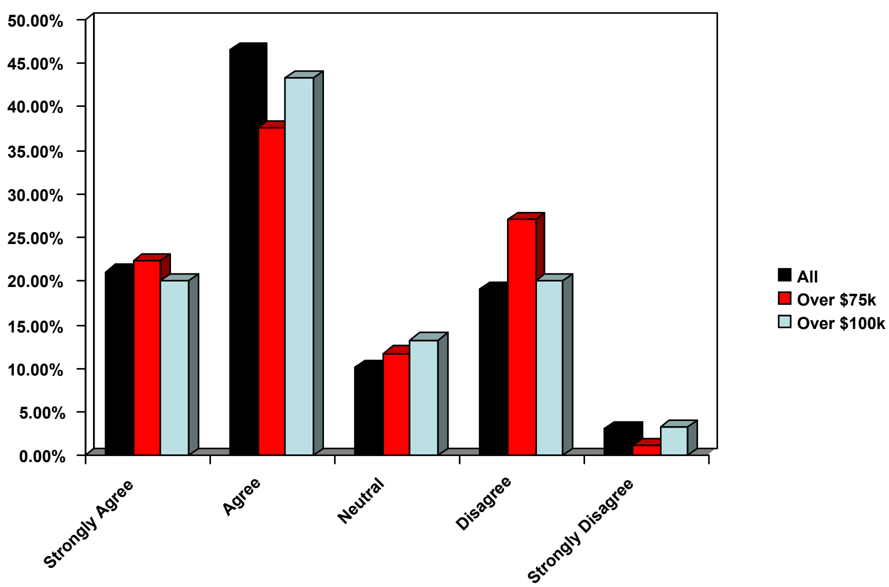
Many of the respondents (70%) agreed that downtown is the heart of the community indicating a strong sentiment for downtown Saint



Albans. Respondents gave similar answers when asked if the success of downtown is important.

5.7 Always Try to Buy Locally

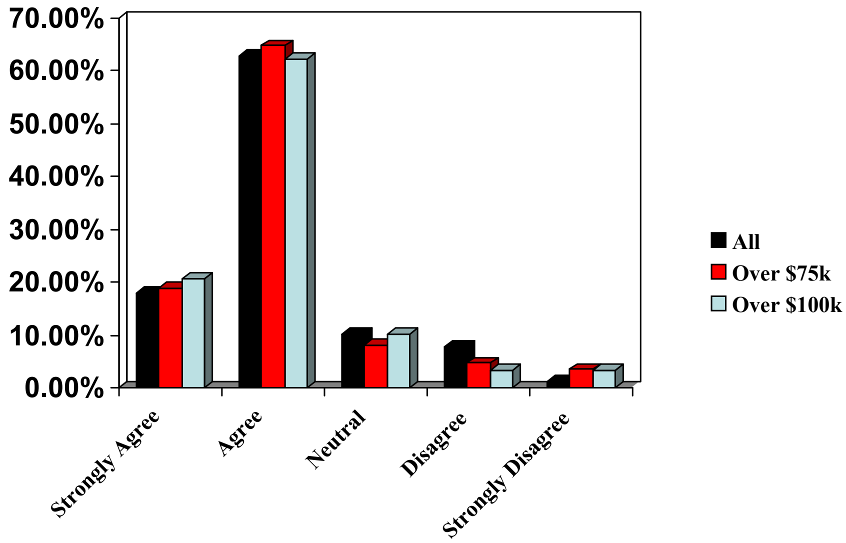
65% of the respondents indicated that they always try to buy locally. Either through habit, lack of local selection, or other motivation many shoppers do end up shopping in Chittenden County for some of their



purchases.

5.8 Customer Service

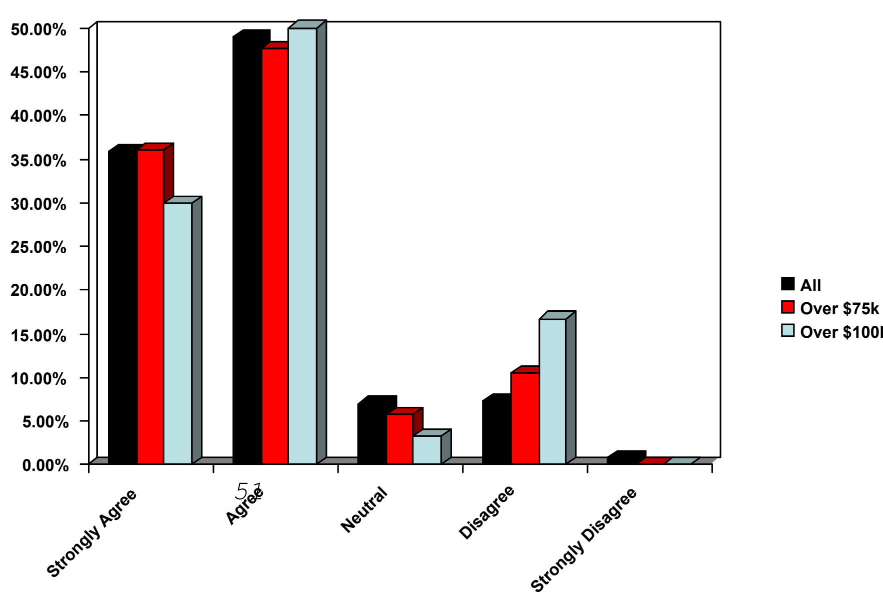
Similar to the merchant responses, customer service ranked extremely high with customers who participated in the survey. Nearly 80% agreed or strongly agreed that downtown business had strong



customer service. This gives downtown a decided edge over competitive areas.

5.9 More Day to Day Shopping

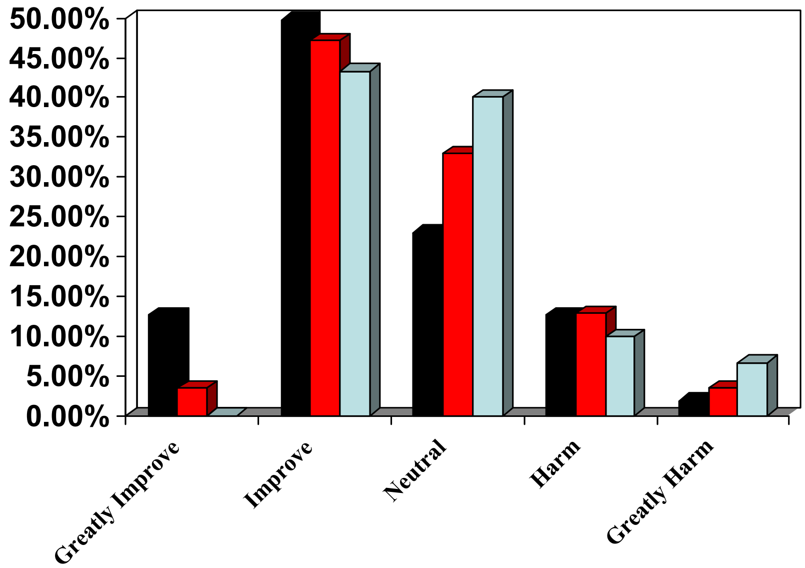
Nearly 80% of the respondents agreed that downtown Saint Albans should have more day-to-day shopping (shown below). The enthusiasm for restaurants and specialty shops was not as strong with 55% and 50% respectively agreeing that more of each was better. While



lack of variety of shops is a major reason people don't shop downtown, the clear sentiment is that the core area does not become an exclusive enclave of "high end" boutiques.

5.10 More Housing

The sentiment for housing was not as strong as that for additional shopping. Over 60% of respondents indicated that more affordable housing (shown below) would improve downtown. Only 25% felt that more "high end" housing would improve downtown. This sentiment is contrary to national trends where more high-end housing is locating in



a downtown but may be attributed to a perceived lack of accessibility for middle class residents for such housing.

5.11 Other Issues

- Customers like to park in front of stores but indicated that they enjoy parking and browsing as well.
- Many customers indicated a desire for a Wal-Mart or Target in the downtown area. Others would like to see some sort of department store but indicated that it NOT be a Wal-Mart. Others still did not want a large Wal-Mart in the community at all. This indicates some of the current debate going on in the community.
- Customers indicated a strong sentiment toward downtown Saint Albans.

6.0 Marketing and Implementation Strategy

The community input, merchant and customer survey, and the market analysis combine to provide important background information to formulate recommendations and strategies for the future success of downtown Saint Albans. This section presents the five strategies that should be the foundation of revitalization work in the downtown area over the next seven years. Each of the five strategies is defined by the findings of the analysis work, a goal for the future is presented, and within each of the five strategies short, medium and in certain cases, long term strategies are presented.

6.1 Fostering the Image: The Marketing Strategy

6.1.1 ***The Issues***

- Downtown's initial focus should be on retaining customers from greater Saint Albans area. The market information presents compelling evidence that customers within the City of Saint Albans are more loyal to downtown shops than those in the Town of Saint Albans and in outlying areas. Further competition in other areas and a lack of focus from downtown on these areas could erode downtown's current strong market position.
- Saint Alban's primary trade area that includes downtown represents a major share of regional retail trade in the overall region. The primary trade area for Saint Albans represents about an 11% market share of the greater region including all of Chittenden County. Considering the strong retail presence in Chittenden, this is significant. Downtown should continue to capitalize on this position.
- Market share for downtown will erode as growth continues unless downtown shops continue providing exceptional service catering to the greater area. In the customer and merchant surveys, customer service was the clear differential between what downtown had to offer compared with other areas in the region. Personal attention and excellent service will continue to motivate shoppers to shop in any downtown location particularly one like Saint Albans where customer service is perceived to be already high.
- A clear and consistent message must be made to convey

what makes downtown Saint Albans unique. Currently, Saint Albans does not have a clear marketing focus for downtown. The various brochures, publications, and ads for downtown each present a different image for the community. A clear message will help to define downtown, convey to customers what the community has to offer, and reinforce the strong sentiment that customers already feel toward the value of a strong downtown.

6.1.2 Goal

Downtown St. Albans is the center of a progressive community that embraces the natural environment that fuels its economy and its rich past, which has made it a unique downtown within the State of Vermont.

6.1.3 Action Strategies

Short Term – 2006

- *Adopt and implement a popular logo for downtown Saint Albans.* A popular logo for downtown should be used to create a "brand" for the community that makes a lasting impact on its customers. The brand should be used as often as possible and should reflect the market forces at work in a community.

  For Saint Albans, the recommended logo design combines the important historical component of the fountain in Taylor Park with contemporary colors and fonts. The result is a "clean" modern look for the logo that also has strong ties to the history of the community. The green and blue colors symbolically link the water of Lake Champlain with the Green Mountains, which are shown in the background of the logo. The logo is shown both for a Citywide and a downtown focus. In certain applications, only the font itself can be used. These examples are shown in the figures to the right.

- *Apply the logo in a number of applications.* Once the logo is adopted it is important to begin using it and its variations in an entire host of different applications. SAFF itself should be the first to use a version of the logo which can then be extended to special events such as the Maple Festival or the Farmers Market. In each of the designs, certain color cues and the fonts remain the same while allowing for

Figure
Albans
shown f
Downtow
the log

some flexibility of the design to accommodate the needs of the various groups and events. Over time, this type of brand use and re-use will reinforce the brand in the customers mind.

- *Develop marketing collateral utilizing logo*. The best applications of the logo will be when it is incorporated into designs for various collateral pieces such as the shopping and dining guide, a business directory, a business welcome packet, and a frequent dining card.
    - *Create shopping & dining guide*. This should incorporate the new logo and design in its 2006 print run. A sample of what this might look like is shown in the figure on the following page.
    - *Create business directory, welcome packet, and relocation guide* for Saint Albans.
    - *Develop Frequent Dining card* that can be used to promote special events and activities (not discounts) among the restaurants downtown. The restaurants in Saint Albans create quite a draw and can jointly market themselves to the public. The figure on the following page shows an example.

Figure 16: Examples of how the brand can be extended without compromising the original design.

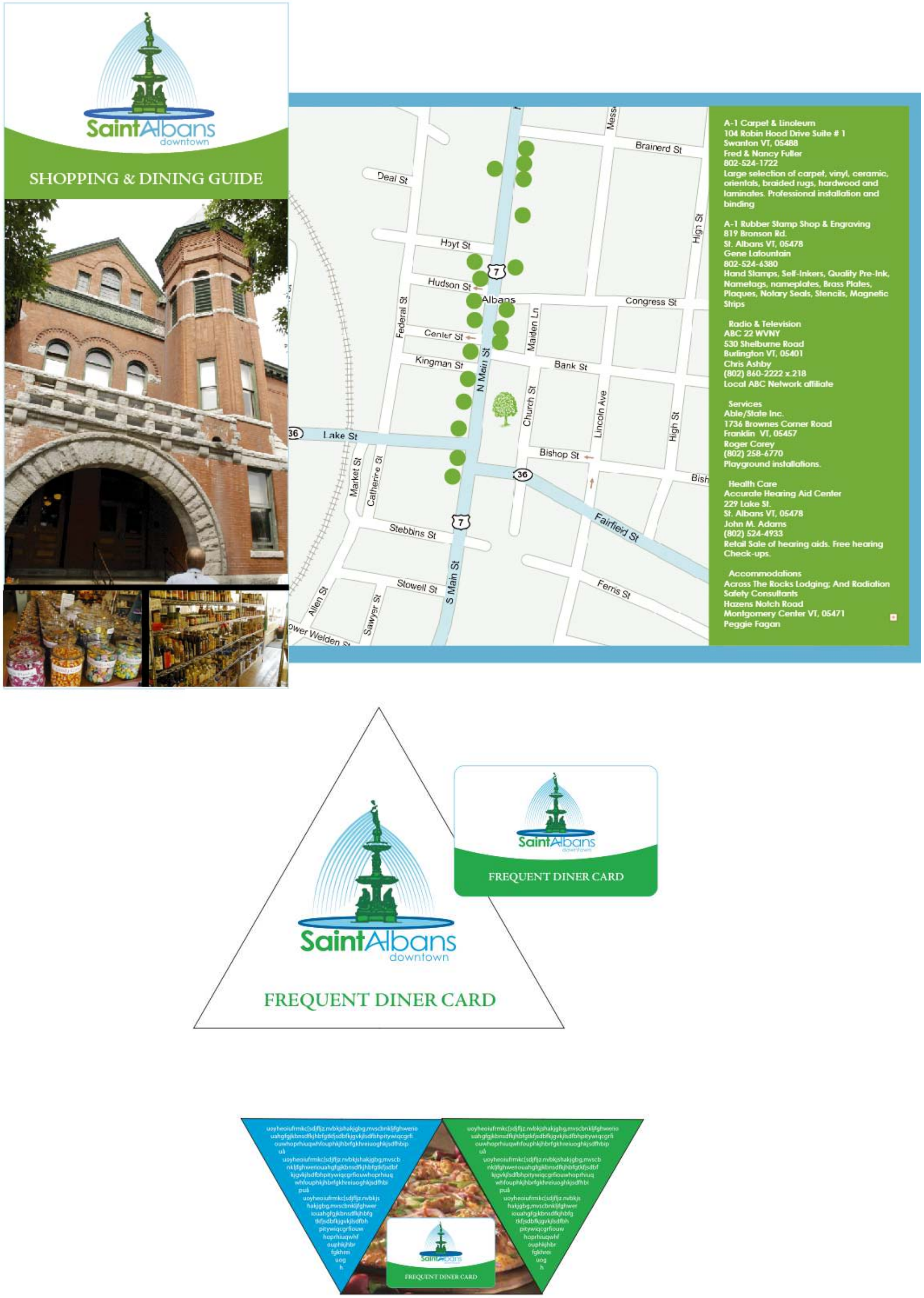


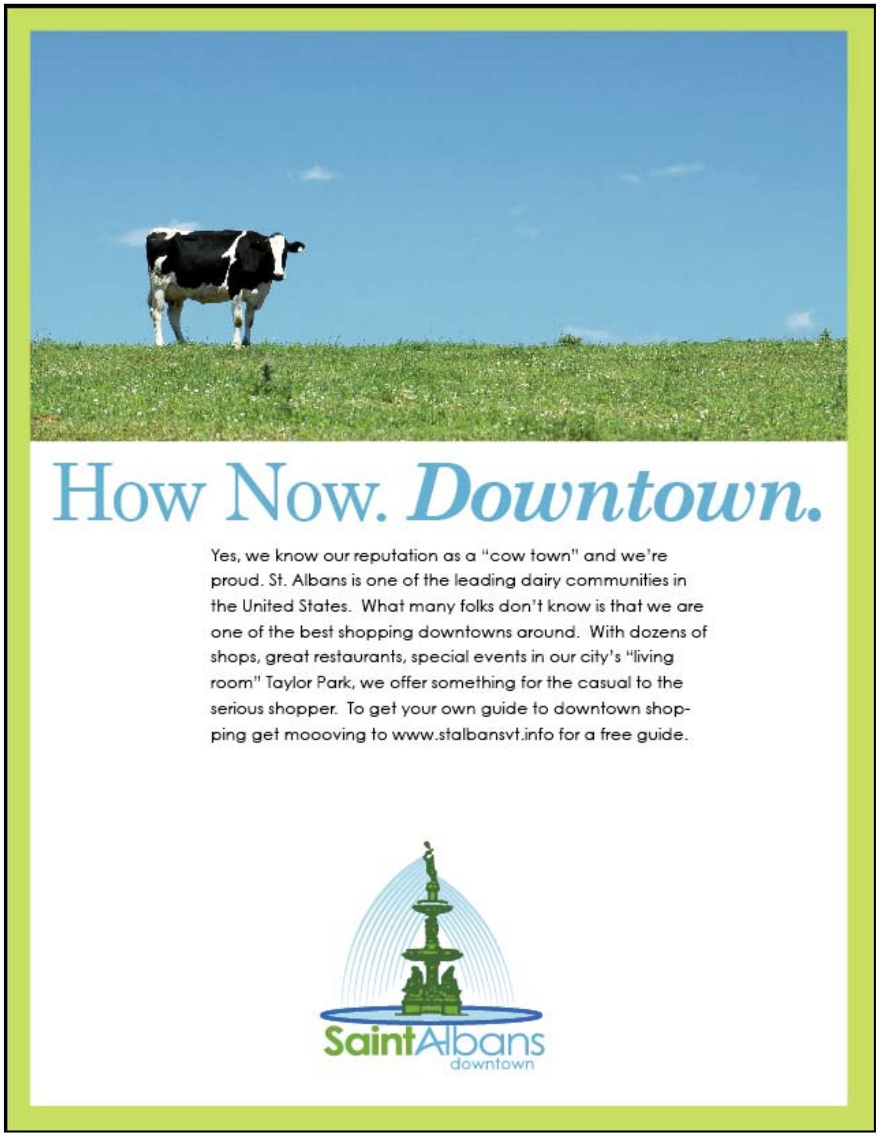
Figure 17: Examples of brochure design and frequent diner card for Saint Albans.

- *Focus initial marketing effort on Saint Albans City, Town, the secondary trade area, and local employees.* The market data shows that customers within the primary and secondary trade area represent over seven out of ten customers to downtown shops. These customers are the most loyal shoppers and those that can be the most easily cultivated to become more loyal. This is particularly true since the shopper loyalty drops significantly as we examine customer patterns in the City compared with the Town and surrounding area. A savvy marketing campaign geared toward these customers will be helpful in reinforcing their existing patterns and in some cases reacquainting them to what downtown has to offer. The figure on the following page shows examples of these ads that humorously play on the history of Saint Albans and its future. Examples of "co-op" ads with local businesses are also shown.

- *Create new SAFF website using brand.* The current SAFF website, while attractive, should be redesigned to accommodate the new brand. Additionally, the community should examine a single web portal that will offer visitors to Saint Albans a seamless experience to navigate through everything the City has to offer. This can be much more efficient than having a number of distinct web addresses.

Figure 18: Example of SAFF website redesign.

- *Market all events*. Event marketing should also incorporate the brand for Saint Albans. This can allow the brand to extend to groups that might otherwise not be familiar with it.



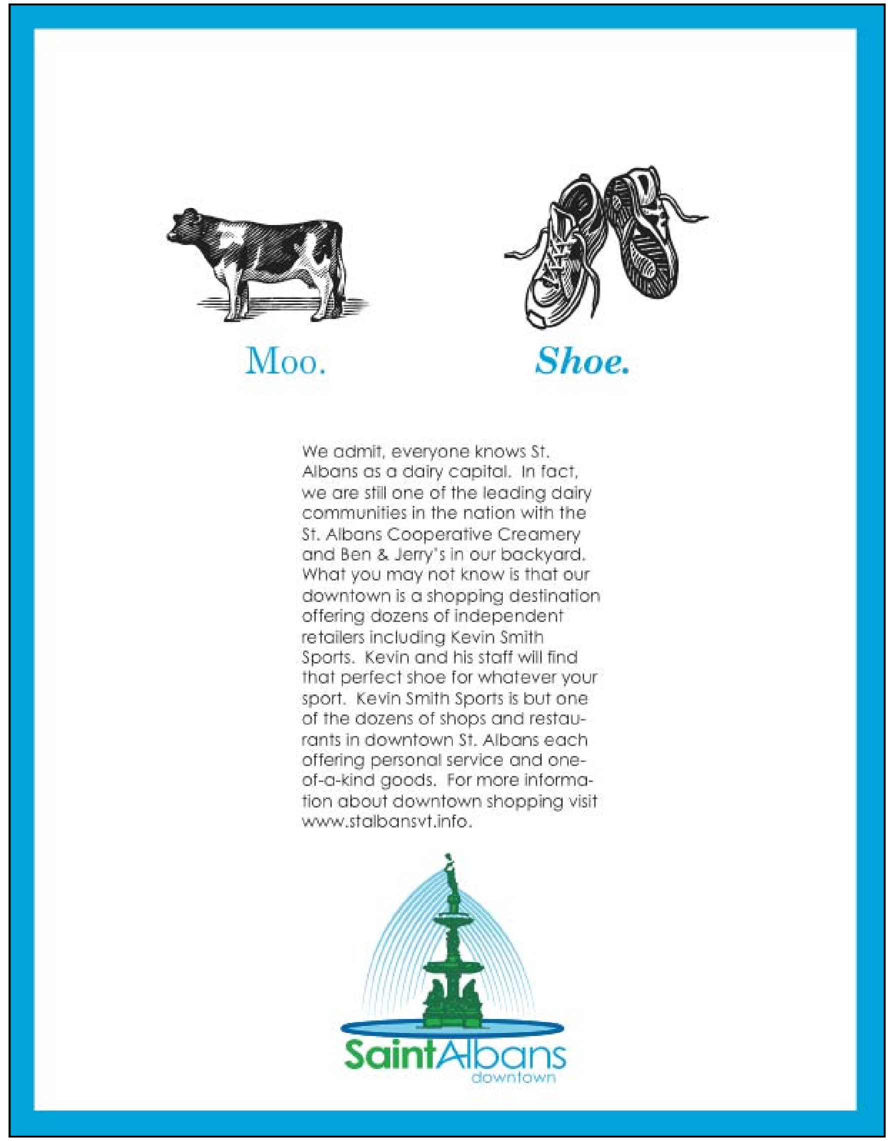


Figure 19: Examples of marketing ads geared toward the primary and secondary trade areas for Downtown Saint Albans

Medium Term – 2007-2008

- *Extend marketing efforts to Burlington and north Chittenden County.* Once the brand has been launched locally, then it can be expanded further within the region. This will have to be done carefully since the Burlington/Chittenden market can be more costly and can have a more diluting effect on the marketing message. Frequently, communities decide that a very targeted campaign can be effective (perhaps targeting restaurants or special events). Frequently, these ads can be cooperatives with local businesses that were already marketing in these markets. An example for Chow Bella! is shown below. This ad promotes the

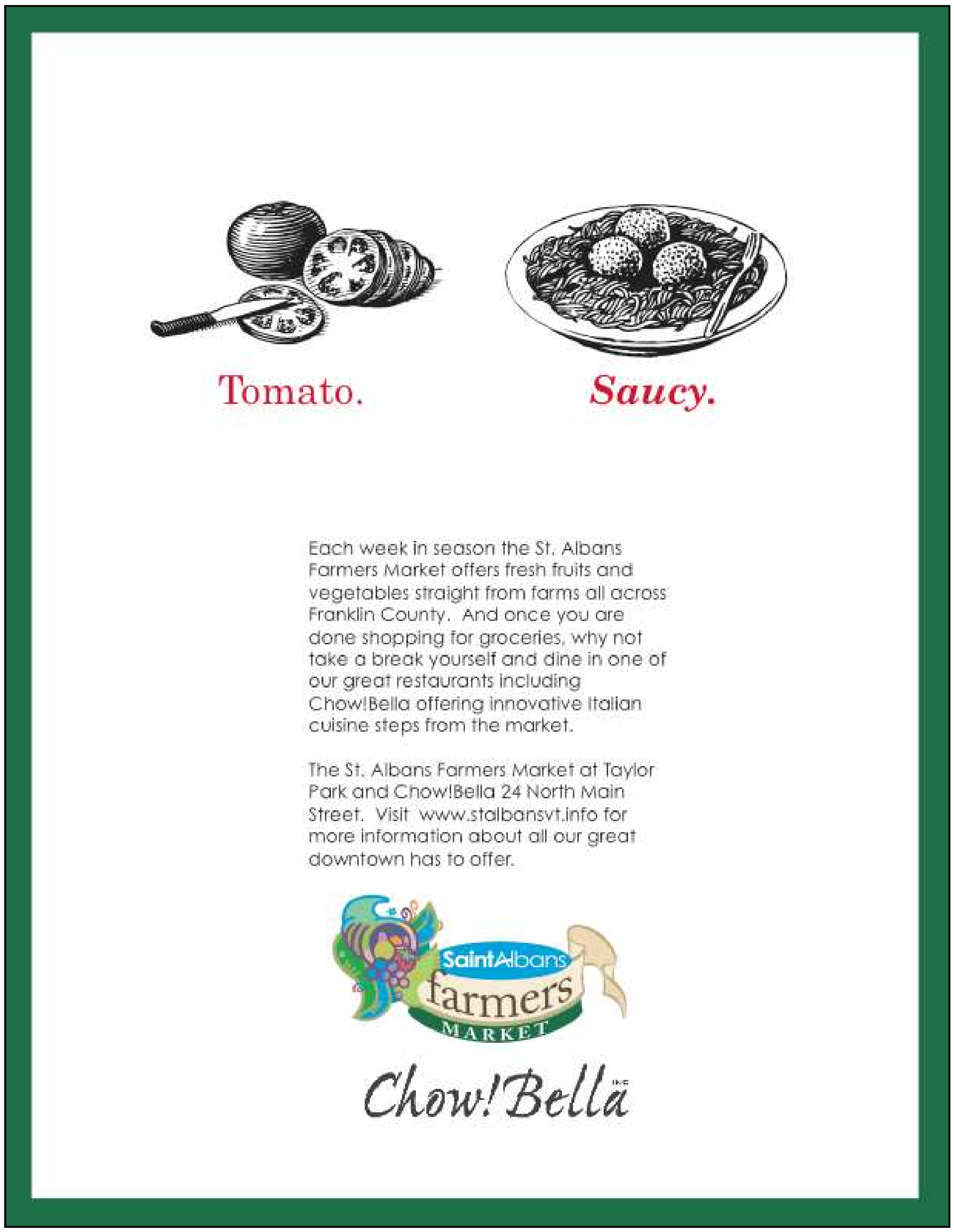


Figure 20: Concept co-op ad.

farmers market and the restaurant both of which are attractions for Chittenden County residents.

- *Put new marketing materials at all rest areas and the State Department of Tourism.* By 2007, Saint Albans can really begin marketing to a State wide audience by placing the shopping and dining guides at rest areas through the Vermont State Department of Tourism.

- *Implement first phase of signage using the logo for Taylor Park.* Up to this point, the Saint Albans brand has been used primarily in print material. By 2007 it will be important to begin using the logo and brand in public place signs such as Taylor Park.

- *Apply brand to downtown gateway signage.* Gateway signs can also be one of the early implementation steps for the new brand. The example in the figure to the left shows what a downtown gateway sign might look like. At the same time, Saint Albans should be asking the department of Transportation for brown historic downtown signs for the interstate exits that lead to downtown.

- *Historic Walking Tour.* Downtown has one of the most impressive collections of historic buildings. The brand can extend to a downtown walking tour perhaps in collaboration with the Museum.

Long Term – 2009-2012

- *Implement wayfinding strategy using adopted brand.* While the downtown gateway sign is an important step, Saint Albans needs a comprehensive wayfinding system to direct visitors from the Interstate into town, from downtown to parking, and once parked for pedestrians to reach the businesses. These systems can really add to the image of downtown and can help direct people from other shopping districts into the core of the community. Official downtown designation allows downtowns to use these special signs. The figure on the next page shows what this sign system would look like.

- *Identify funding streams for the marketing strategy.* While the initial phase of the marketing project can involve a "loose" collaborative of businesses, SAFF, the City, and other partners, once the effort moves into a tourism market base, the costs will increase. Some communities have formed marketing collaboratives to promote themselves in regional tourism markets while others have worked on an independent or Chamber of Commerce aligned Visitors Bureau. These options should be considered after about five years of the initial marketing campaign.

- *Broaden marketing net to tourism markets and the lake community*. The tourism market can be the most difficult to pinpoint. Penetrating the local market, getting marketing material in regional media, and having brochures in tourism racks are three excellent steps toward reaching a visitor market that by 2009 will already be three years in the making. By 2009, however, the community may want to directly market to visitors through ads in regional tourism publications and other techniques.

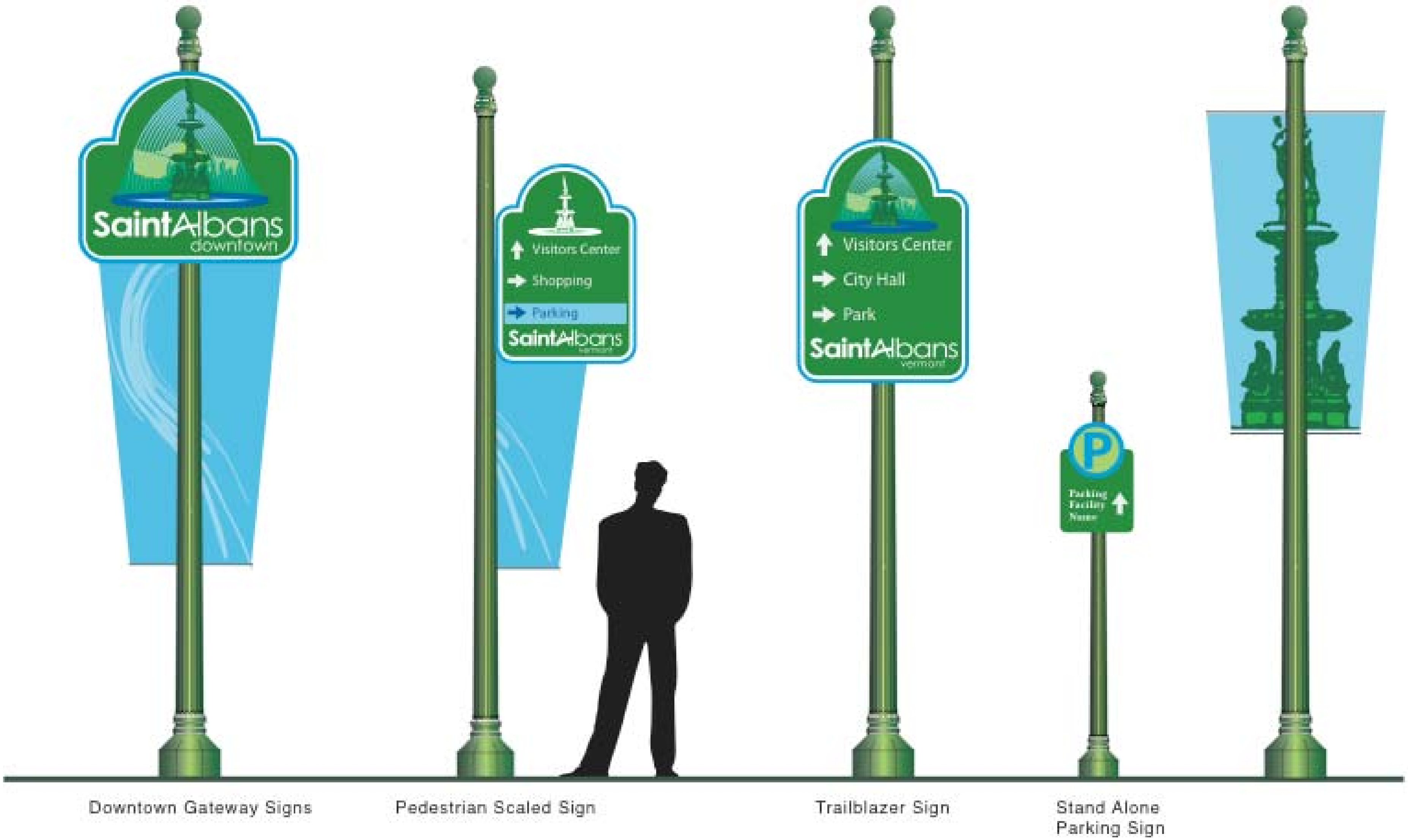


Figure 23: Wayfinding examples.

6.2 Growth Roadmap: The Master Development Plan

6.2.1 The Issues

- The region is experiencing population and income growth. In fact, income levels in the primary trade area for downtown Saint Albans do not lag significantly behind that of Chittenden County. The primary trade area is growing by three to four percent every five years.
- Downtown can accommodate some of this continued commercial growth. With residential growth in the area comes additional demand for consumer goods. Downtown can and must position itself to capture some of this growth even when other areas are growing as well.
- Specific opportunities include Lake Street, the parking lot behind Main Street, and a whole series of under or poorly utilized property throughout the downtown. In fact, these opportunities can become major areas for new construction investment in downtown to accommodate the growth coming to the region.
- In addition to new development sites, several existing buildings are still experiencing vacancies. These building owners can take advantage of the new incentives available to them to renovate.
- In order to stay competitive, downtown must grow with the region. Downtown Saint Albans can be a dynamic part of the community's growth.

6.2.2 Goal

Downtown St. Albans will continue to be a focal point of the community through the redevelopment of historic buildings, while also pursuing development of new projects that will complement the existing mix of residential, retail, and employment in the district.

6.2.3 Action Strategies

Short Term – 2006

- *Implement incentives for business development.* The recent designation of downtown Saint Albans under the

1998 Downtown Development Act has opened its buildings up for significant state tax credits. These credits vary depending on the type of building. Additional funds are available to update buildings and the threshold for act 250 housing units is moved for designated downtowns. All of these incentives are currently available to downtown businesses. In addition, the City should consider a temporary waiver or rebate of business license taxes for certain key businesses identified as being complementary to downtown. These would include food stores and specialty groceries, apparel stores, furniture and home furnishings, book stores, drug and variety stores, radio, television and consumer electronics, hobby, toy and game shops, and restaurants.

- *Business recruitment focusing on market analysis.* These same businesses should be actively recruited by a partnership of SAFF, the Chamber of Commerce, and others. The data generated by this report can be used to help store owners develop a business plan to open a new business or help an existing business expand its product line. Many communities have created "ambassadors" to recruit expanding businesses that fit the mix for downtown into a community.

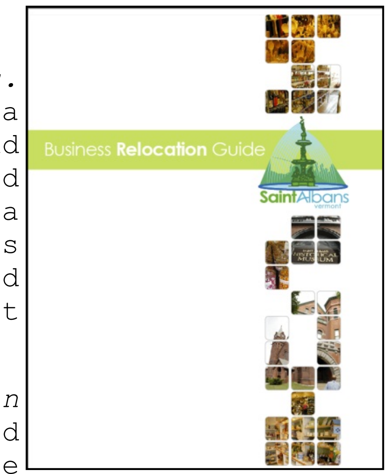


Figure 24: Business relocation guide

- *Begin to market redevelopment opportunities in downtown.* With the brand developed, SAFF should develop a comprehensive inventory of available buildings, sites, and spaces in downtown. This could be part of a business relocation guide to Saint Albans.

- *Obtain funding/issue RFP for physical Master Plan.* This plan has completed a significant portion of the background research that will form the foundation for an updated physical master plan for downtown. The existing plan, which has been in place for about twenty years, is largely complete. New challenges present a great opportunity to develop a new plan for downtown that will identify both public improvements as well as private investment opportunities.

- *Consider developing parking strategy focusing on balancing downtown employment with future growth.* Parking in downtowns is a frequent concern of businesses and shoppers. This proved true again when the customers indicated that they experience frustrations trying to park in downtown Saint Albans. More often than not, parking issues are based on the management of the parking resources rather than simply a lack of parking. A parking "summit" where shopkeepers, customers, and major parking users convene to discuss issues is a great way to tackle many parking issues. The community should be willing to experiment with a variety of techniques to alleviate parking frustrations and should not feel locked in to any one solution. Such a "summit" should happen at least once a year.

- *Business training opportunities through schools.* Local entrepreneurs run many of the businesses downtown. Offering training opportunities to local businesses to hone their skills could be an excellent service to downtown shopkeepers. Since a customer service focus is so paramount in downtown, training can be a way to refine the excellent skills that current shopkeepers already have.

Medium Term – 2007-2008

- *Complete physical Master Plan for downtown.* The physical master plan for downtown will be an excellent companion to this strategic plan. The physical plan will provide locations for future investments for both the public and private sector.

- *Issue RFPs for development of key sites*. Once the master plan is complete, the City of Saint Albans should explore issuing requests for proposals for redevelopments on key sites in the community. Frequently, these RFP's are done in cooperation with private property owners and contain parameters for what the City expects to see on the site along with some exchange in infrastructure provision to make sure the site develops in accordance with the plan. Private property owners are typically in favor of partnering on these RFP's because they can attract a higher quality investment that will yield greater returns on the property.

- *Host a "developers" roundtable*. The Master Plan will be the roadmap for the future physical development of downtown. Bringing regional developers into Saint Albans can allow the community to showcase their plans while soliciting input from experienced voices in the development community.

- *Aggressively pursue additional housing units*. Downtown housing is one of the fastest growing trends in the United States today. Saint Albans already has a wealth of downtown housing, excellent nearby neighborhoods, and the potential for even more. Future downtown housing should include a true mixture of market rate housing, workforce oriented housing, and a small selection of premium units that would attract retirees and young professionals.

- *Improve connection from Saint Albans to Lake*. Lake Street is an untapped resource for Saint Albans. There are many redevelopment opportunities along the street and the Town's plans for Saint Albans Bay create a visitor attraction that is a natural companion to downtown. No other single opportunity offers the City and Town the chance to cooperate on an important project for all of the area citizens.

Long Term – 2009-2012

- *Work with private developers and property owners on key sites*. A number of key sites will warrant particular study as the City and private developers work together on revitalizing downtown. Among those sites are:
    - The Handy Auto Dealership facing Taylor Park
    - Several sites along Lake Street
    - Potential long term redevelopment of the downtown shopping center
    - Several vacant and underutilized properties throughout downtown including many on railroad property
- *Physical Master Plan will identify additional goals & development opportunities.* The master plan will certainly identify additional sites that warrant more examination.

6.3 Heritage and Creative Economy: A Strategic Link

6.3.1 *The Issues*

- The Creative Economy movement in Vermont has taken hold with the 2004 publication of the Vermont Council on Culture and Innovation's report, *Advancing Vermont's Creative Economy*. In Saint Albans, a local group of leaders embraced this effort and ultimately partnered with SAFF to work on projects around the four premises of the report:
    - Support the growth of creative enterprises
    - Promote and document the roles that creativity, culture, and innovation play in Vermont's economic future
    - Invest in communities so they may build on their past while adapting for a vibrant future
    - Develop Vermont's creative economy through community-based planning and improved statewide collaboration
- One of the premises of the Creative Economy is to build the effort around a community's past. St. Albans is the center of one of the most important agricultural region in the Vermont, which uniquely positions the community with a heritage that can have key ties to future creative economy efforts.
- The market analysis identified food items as one of the most significant opportunities for Saint Albans. In fact the community leaks over $24 million in grocery store sales. Similarly, specialty food items have been identified in the retail shares analysis of having a need in the community.
- Restaurants and food retailers are already key anchors to downtown with the Rail City Market, the Farmers Market, As the Crow Flies, and numerous restaurants. These businesses are instrumental parts of the downtown market mix. This foundation provides a critical mass on which to build additional related businesses.
- The Farmer's Market itself has strong potential for future growth because of its central location and strategic role in linking the economic engine of Franklin County (agriculture) directly with consumers. Furthermore, Farmers Markets are receiving a national resurgence as people explore alternative ways to get quality food.

6.3.2 Goal

Downtown St. Albans is a community that embraces the creative economy using its heritage as a key to unlock its creative potential including agricultural and food related industries.

6.3.3 Action Strategies

Short Term – 2006

- *Complete creative economy application*. This application was approved in 2005 allowing Saint Albans to go through the creative economy process.
- *Identify an agriculture and food based strategy for art and retail*. The link between Saint Albans farm heritage and art, retail, and other creative economy based ventures should be explored in greater detail.
- *Create downtown retail opportunities profiling regional products*. The existing stores downtown can reinforce the local and regional products that they feature. This is particularly true of the farmers market and food related retailers.
- *Build events around food themes*. The warm weather season presents great opportunities for regular events associated with the Farmers Market. These events should be small in nature and can focus on food related themes to drive customers to downtown. Whether it is a cooking demonstration, a wine tasting, or some other related event, it will link the activity of the Farmers Market with the shops downtown and the economic gap that is currently not being filled in Saint Albans.
- *Incorporate into the Maple Festival local foods & food products*. The Maple Festival has been the premier local event in Saint Albans for many years. There is a significant opportunity to focus on local foods and food products as a component of this festival. Downtown merchants can help promote this as an adjunct to the current event.
- *Market downtown food related retail*. As mentioned before, a marketing strategy that profiles what is already available downtown can be beneficial to jump start this effort. The examples in the figure on the

following page show how this can be done consistent with the downtown brand.

Medium Term – 2007-2008

- *Events calendar*. Saint Albans should coordinate a communitywide calendar of events starting in 2007. This could be mailed to local residents or could be an online interactive calendar. This will take coordinating among several key partners for success.
- *Build pavilion for farmers market for more permanent home*. Over time, the farmers market, currently an open air facility, could expand to adjacent sites and include a more permanent "pavilion" or enclosed space for certain food related uses. This is likely to be a component of the Physical Master Plan identified in the prior strategy for downtown.
- *Develop the Saint Albans food emporium*. With such significant leakage in food related items, downtown Saint Albans should explore additional downtown specialty food stores. This may be an expansion of an existing store or an additional store.

Figure 25: Examples of food related marketing that can be launched in 2006.

6.4 Taylor Park: The Centerpiece of Downtown

6.4.1 The Issues

- Taylor Park is organizing element of downtown. From the churches, courthouse, and museum on one end, to the commercial establishments on the other, Taylor Park is truly the centerpiece of downtown.
- Historically, Taylor Park has been the "heart and soul" of Saint Albans. Nearly all of the significant citizen gatherings for Saint Albans have happened in Taylor Park for well over a century. This is truly the "living room" for Saint Albans area residents.
- While there is a lot of affection for Taylor Park, it has been underutilized and underappreciated in recent times and it doesn't serve as such a significant center of activity for all residents. It has lost its role as a "showplace" for the community.
- This sentiment for the current state of the park has led to a change of fortune. In recent months, citizen groups have been diligently working to improve the park in an effort to have it reclaim its historic prominence in the community.

6.4.2 Goal

Taylor Park will reclaim its symbolic and functional role as St. Albans' "living room." It will be a place for all of St. Albans, a place of celebration, the showplace of downtown and the community gathering place

QuickTime™ and a TIFF (LZW) decompressor are needed to see this picture.

6.4.3 Action Strategies

Short Term – 2006

- *Host a Taylor Park visioning workshop*. This workshop was held in November 2005 and it produced a series of implementation recommendations for short and long term improvements. The results of the workshop should be shared with City Council.
- *Master Gardeners develop horticultural options to preserve and enhance the landscape.* This would include pruning the low branches so you can see through the park and take down the bad trees that will ultimate detract from the park and potentially cause damage.

- *Hold monthly events in the park*. This effort should be driven by SAFF promotional committee and done in partnership with the Farmers Market as indicated in the recommendation above. These events will create more interest in the park.

- *Involve students in projects including clean up*. Many students use Taylor Park. By giving them a stake in its improvements, they too will be stewards of the revitalization of the park.

- *Establish an advisory and coordination organization or group to make recommendations on management and oversight of the park*. This group should be an active group of volunteers that would partner with the City, SAFF, veterans and other groups to ensure that the park has continued maintenance and improvement.

- *Publicize changes to the park*. The volunteer committee could sponsor a regular article in the paper.

Medium Term – 2007-2008

- *Complete a round of physical improvements to the park* that would include: Removing the fence, which is a safety hazard, installing better trash receptacles as well as recycling receptacles, installing festive banners on poles surrounding the park, and working with Veterans groups to put flags around the monuments.

- *Create a park master plan*. This plan could be part of the downtown master plan or a separate undertaking. Either way, the plan should address the following:
    - Installing electricity throughout the park
    - Temporary staging for events
    - Public restroom locations
    - Creating an events area
    - Repositioning monuments
    - Creating amenities for kids
    - Creating multi-generational amenities
    - Optimum use/location of the band shell
    - More and alternative types of seating.

- *Do a definitive history on the park and use for park interpretation*. This could be an excellent collaborative effort between young people and seniors to compile an official and anecdotal history of the park.

Long Term – 2009-2012

Each of these long term recommendations came from the visioning workshop held in November.

- *Restore the fountain.*
- *Information kiosks at north and south ends of park.* This could be done as part of the overall wayfinding plan for Saint Albans.
- *Install more lights such as lighting at the central garden.*
- *Installing a clock in the central garden.*
- *Redesigning the reflecting pool for use by kids.* Many communities have "play fountains" for kids. This could be an excellent family summertime activity for the park.

6.5 SAFF and Its Partners: The Organizers for Success

6.5.1 The Issues

- Many groups are actively working to improve downtown although they sometimes have different priorities at different times. Being able to rely on a number of groups is important to the success of any community initiative.
- These groups need to come together around a common vision. This document attempts to formulate a vision for the future of downtown that focuses on five key strategies. Each group can play an active role in implementing this plan.
- SAFF has engaged these groups and general citizenry through this process. With nearly fifty interviews, several public forums, participation by many downtown businesses, and survey work of over 400 citizens, this process has included the community in a discussion of downtown's future.
- The Chamber of Commerce is an active participant in marketing Saint Albans and Franklin County to the world. It is also an ombudsman to the business community and a valuable partner in the effort.
- While the political organization of Vermont communities can result in friction between the desires of a Town and a City, the need for cooperation between the City and Town of Saint Albans is obvious. The relationship

is "symbiotic" and to many residents no regular distinction exists between the two.

- Now have a full-time downtown manager. This is one of the most important steps that the City and SAFF have taken to ensure continuity of the revitalization effort for downtown.

6.5.2 Goal

With SAFF as the steward of downtown, it engages a host of partners in coming together working toward the common goal of preserving downtown Saint Albans' place as the heart of regional economy

6.5.3 Action Strategies

Short Term – 2006

- *Host Leadership Roundtable*. This event was first held in the fall of 2005. About every four months, the community should hold another Summit or Roundtable meeting hosted by SAFF that would involve representatives from the Chamber, the City, the Taylor Park stewards, merchants, Franklin County Industrial Development Corporation, the Town, and Northwest Regional Planning. This roundtable should review the strategy board for downtown and report on progress on efforts.
- *Have each implementing organization officially endorse strategic plan and respective tasks.* Each of the partner organizations above should formally endorse this plan as a strategic document guiding the future of downtown while acknowledging its role as a partner in the effort.

- *Build a communication strategy*. Any successful plan should have a communication strategy that would share progress with the partner group

Medium Term – 2007-2008

- *Explore Capital Campaign*. Additional funding needs for SAFF and its partners will come to light as the plan develops. One opportunity might be to conduct a capital campaign for additional downtown improvements. The SAFF board should explore this option.

- *Consider Business Improvement District*. An alternative funding technique allowed in Vermont is a Special Assessment District for downtown that can fund both operational and capital improvements to the community. This option should also be examined in the mid-term time frame.

Long Term – 2009-2012

- *Tax Increment Financing*. Vermont does allow tax increment financing as a tool to explore infrastructure provision in revitalization areas. Tax Increment Financing takes the additional revenues generated by an investment and uses those revenues to fund a bond for physical improvements to the public infrastructure. It has been used in many states including Vermont to ensure that new developments "pays its own way" for improvements. Tax Increment Financing does not increase taxes but rather uses the increased value of a property to fund improvements. This technique may be a valuable resource for Saint Albans in the long term as new development takes place downtown.

6.6 The Strategy Board

6.6.1 Projects and Initiatives

The attached "Strategy Board" summarizes all of the projects and recommendations included in this report. The board is intended to be used as working document for benchmarking and ongoing evaluation of the implementation process. Each recommendation that is presented in brief on the strategy board is supported in this report documentation.

6.6.2 Strategies and Visions

Each of the plan strategies and visions are outlined in the strategy board. It is important to remember the ultimate marketing and development strategies that each project supports. Each of these strategies is linked with one another, but failure to achieve one goal does not negate the ability to achieve others.

6.6.3 Responsibilities

The strategy board presents the partner organizations. SAFF should foster an ongoing discussion with various partners to see which responsibilities each will take the lead on. Each partner is color-coded and can identified next to each strategy. While an agency may be assigned lead role for implementation, each of these projects should be pursued through partnerships. As the plan progresses, these responsibilities should be reevaluated to determine where roles should change or shift.

6.6.4 Time Frames

The projects are divided into three time frames. The first series of projects are demonstration projects that should begin immediately. For the most part, these are simple projects that will be highly visible, have significant impact and should be completed within the first two years after the plan is adopted. The second set of projects is labeled "mid term" or next step projects. Some of these are more advanced projects while others are continuations of projects that began during the demonstration period. The next step projects should be completed within the following three years. The final series of projects are long-term or plan completion projects. Many of the projects begun in the next steps phase will not be completed until after the 2009 deadline. Over time this category will continue to fill as priorities evolve.

The strategy board and its recommendations represent a "living document". As time goes by and implementation proceeds, some priorities will shift while other ones will arise. The implementation strategy board should be evaluated periodically, no less than annually. This evaluation process will allow for finished tasks to be indicated on the board, for responsibilities to be shifted between parties, and for time frames to be adjusted for individual projects.

6.6.5 Conclusion

This report is the product of an unprecedented effort on the part of the Saint Albans for the Future, the City of Saint Albans, and the partner organizations to engage the community in an effort to examine the future success of the downtown. It is only through this continued spirit of partnership that the plan can be successful.

INSERT STRATEGY BOARD HERE

7.0 Appendix A: Merchant Survey

Survey of Businesses
Downtown St. Albans, Vermont

1. What are the main reasons that customers shop in downtown St. Albans? (Check all that apply)

___ Good prices
___ Convenient to home
___ Quality of stores, products
___ Variety of stores, products
___ Specialty stores and unique products
___ Personal service
___ Convenient to work
___ Convenient business hours
___ Other (Specify: ____________)
___ Don't know/no response

2. What are the main reasons that customers don't shop in downtown St. Albans more frequently?

___ Lack of store, products, variety
___ Inconvenient to home, work
___ Inconvenient parking, access
___ Safety concerns
___ Other (Specify: ____________)
___ Quality of stores, products
___ Prices
___ Inconvenient business hours
___ Poor service
___ Don't know/no response

4. Please indicate the percent of your customer base from the following locations:

___ St. Albans City
___ St. Albans Town
___ Rest of Franklin County
___ Canada
___ Chittenden County
___ Grand Isle County
___ Other parts of Vermont
___ Visitors from other states
___ Other particular market (phone, Internet, other locale) _______________________

5. Rate downtown St. Albans on the character of its shopping environment from 1 to 10, with 1 being poor and 10 being excellent

	Poor							Excellent		
Quality of retail	1	2	3	4	5	6	7	8	9	10
Variety of retail	1	2	3	4	5	6	7	8	9	10
Quality of restaurants	1	2	3	4	5	6	7	8	9	10
Variety of restaurants	1	2	3	4	5	6	7	8	9	10
Personal service	1	2	3	4	5	6	7	8	9	10
Prices	1	2	3	4	5	6	7	8	9	10
Convenient parking	1	2	3	4	5	6	7	8	9	10
Amount of Parking	1	2	3	4	5	6	7	8	9	10
Feeling of safety	1	2	3	4	5	6	7	8	9	10
Overall attractiveness	1	2	3	4	5	6	7	8	9	10
Traffic circulation	1	2	3	4	5	6	7	8	9	10
Sidewalks and Crosswalks	1	2	3	4	5	6	7	8	9	10
Upkeep of buildings	1	2	3	4	5	6	7	8	9	10
Maintenance of sidewalks, parking	1	2	3	4	5	6	7	8	9	10
Convenient hours	1	2	3	4	5	6	7	8	9	10

6. Please rate the following business challenges you may have in downtown St. Albans:

Poor Excellent

Competition in St. Albans City	1	2	3	4	5	6	7	8	9	10
Competition in Franklin County	1	2	3	4	5	6	7	8	9	10
Competition in Chittenden County	1	2	3	4	5	6	7	8	9	10
Signage and Directions to Parking	1	2	3	4	5	6	7	8	9	10
Amount of Parking	1	2	3	4	5	6	7	8	9	10
Parking Management (time limits, Permit requirements, etc.)	1	2	3	4	5	6	7	8	9	10
Vandalism	1	2	3	4	5	6	7	8	9	10
Rent	1	2	3	4	5	6	7	8	9	10
Taxes	1	2	3	4	5	6	7	8	9	10
Regulations	1	2	3	4	5	6	7	8	9	10

7. How strongly do you agree or disagree with the following statements about Downtown St. Albans;

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
Business in downtown St. Albans is good	A	A	A	A	A
Downtown business has improved over the years	A	A	A	A	A
I am optimistic about the future of downtown	A	A	A	A	A
I feel safe downtown (even at night)	A	A	A	A	A

I always try to buy locally	A	A	A	A	A
I always direct customers to other downtown businesses	A	A	A	A	A
The existing business mix downtown helps my business	A	A	A	A	A
The look of downtown helps my business	A	A	A	A	A
My business is open when customers want to shop	A	A	A	A	A
My employees show great customer service	A	A	A	A	A
My advertising helps my business	A	A	A	A	A
Downtown events directly benefit my business	A	A	A	A	A
Downtown events indirectly benefit my business	A	A	A	A	A
Tourism is a major portion of my customer base	A	A	A	A	A

8. How satisfied are you with the present location of your business?

____ Very Satisfied
____ Somewhat satisfied
____ Neutral
____ Unsatisfied
____ Very Unsatisfied
____ Plan to move

8. Do you have plans to expand or reduce your business in the future?

____ Expand products/services downtown
____ Expand products/services elsewhere
____ Reduce products/services
____ No plans to change

9. Where do your customers typically park?

____ On the street
____ In a private lot

____ In a public lot
____ Other ______________________

10. How far from your business do your customers typically have to park?

____ Directly in front
____ ½ Block
____ 1 Block
____ 2 Blocks
____ 3 Blocks
____ 4 + Blocks

11. Where do your employees typically park?

____ On the street
____ In a private lot
____ In a public lot
____ Other____

12. How far from your business do your employees have to park?

____ Directly in front
____ ½ Block
____ 1 Block
____ 2 Blocks
____ 3 Blocks
____ 4 + Blocks

13. Please indicate your store hours:

Monday ____________________________________
Tuesday ____________________________________
Wednesday __________________________________
Thursday ___________________________________
Friday _____________________________________
Saturday ____________________________________
Sunday _____________________________________

14. What are your thoughts on store hours?

____ I am open all the hours I need to be
____ I am open longer than many other stores downtown
____ I cannot be open longer for personal reasons
____ I should be open longer but cannot find/afford staff
____ I would be open more if I were sure of good sales

____ I would be open more if everyone else were

15. What are your three busiest months?

1) 2) 3)

16. What are your three least busy months?

1) 2) 3)

17. Mark which best describes your customer volume on a typical day:

____ Less than 10 customers
____ 11-20 customers
____ 21-50 customers
____ 50-100 customers
____ 100-250 customers
____ over 250 customers
____ not customer driven (Internet, phone, etc.)

18. Please describe your target market:

Gender: ___ Male ___ Female
Age: ___ Under 18 ___ 18-24 ___ 25-44 ___ 45-64 ___ Over 64
Income: ___Under $25K ___$25K to $50K ___$50K to $100K ___over $100K

19. My products/services are geared toward which price point?

____ Low end ____ Average ____ High end

20. Name two existing businesses that best complement your business downtown (please use store names)

1) ______________________________ 2) ________________________________

21. Name two new businesses that would best complement your business in downtown (you may name a specific store name or type):

1) ______________________________ 2) ________________________________

22. What percent of your advertising budget do you use for: (total should equal 100%)

____ Direct Mail ____ Local newspaper ____ Radio ____ Cable
____ Network TV ____ Regional newspaper ____ Billboards ____ Internet
____ Window Displays ____ Other (specify): _____________________________

23. Please indicate how increasing or creating the following community components would affect your business:

	Greatly Improve	Moderately Improve	Neutral	Moderately Harm	Greatly Harm
Upper Floor Market Rate Housing	1	2	3	4	5
Upper Floor High End Housing	1	2	3	4	5
Upper Floor Affordable Housing	1	2	3	4	5
Walking/Biking Trails	1	2	3	4	5
More surface parking	1	2	3	4	5
More street parking	1	2	3	4	5
Parking Garage	1	2	3	4	5
More small regularly scheduled events	1	2	3	4	5
More large annual events	1	2	3	4	5
Better directional and wayfinding signs	1	2	3	4	5
More visitor promotion	1	2	3	4	5
Co-operative ad campaign	1	2	3	4	5

Other ____

24. Name three products or services that differentiate your business from your competition:

   1) ______________________________

   2) ______________________________

   3) ______________________________

25. How many years has your business been in downtown St. Albans? __________

26. How many employees do you currently have? _________

27. In your opinion, what have been some of the most noticeable changes in downtown St. Albans? (good or bad)

28. Why did you choose to locate your business in downtown St. Albans?

29. What would you like to see for the future of downtown St. Albans? List ideas for businesses, cultural, and aesthetic improvements.

30. Do you support the community's efforts to attract businesses, investment, shoppers, and events to downtown St. Albans? Are you…

____ Strongly Supportive
____ Moderately Supportive
____ Indifferent
____ Moderately Opposed
____ Strongly Opposed

Comments:

8.0 Appendix B: Customer Survey

Survey of Customers
Downtown St. Albans, Vermont

Hello, my name is __________ and I'm calling from Clemson University in South Carolina. We are working with civic leaders in your community to gain information about the retail offerings in downtown St. Albans. In addition, we have a few questions about your shopping experience and preferences. This survey will take about ten minutes of your time and will be beneficial to the development of your downtown shopping district. Your opinions and insight are greatly appreciated. Participation in this research is completely confidential and voluntary and we are not selling any product or service.

IF QUESTIONS ABOUT STUDY GIVE DR. WITTE'S NUMBER 864.656.3816 OR NOTE THEIR NUMBER AND HAVE THEM CALLED.

Would you be willing to help us with this research?

1. How often do you shop in downtown St. Albans

___over once a week
___at least once a week
___once or twice a month
___once every few months
___once or twice a year
___never

2. Please answer yes or no to the following questions:
I shop downtown because…

it has good prices	yes___	no___
it is convenient to home	yes___	no___
it is convenient to work	yes___	no___
of the quality of stores	yes___	no___
of the variety of stores	yes___	no___

it has convenient business hours yes___ no___
it has specialty stores and unique products yes___ no___
the stores offer personal service yes___ no___
the stores offer friendly service yes___ no___

3. Is there a reason you shop downtown not mentioned? If so what?

____

4. Please answer yes or no to the following questions:
I don't shop downtown more because…

Lack of stores, products, variety yes___ no___
Quality of stores, products yes___ no___
Inconvenient to home or work yes___ no___
Inconvenient parking access yes___ no___
Inconvenient business hours yes___ no___
Traffic is too heavy yes___ no___
Prices yes___ no___
Safety concerns yes___ no___
Poor service yes___ no___

Is there a reason you don't shop downtown more that has not been mentioned?
If so what?

____

5. All in all, what is the **main reason that you don't shop more** in downtown St. Albans?

6. Please check the statement that best describes how frequently you shop in the following locations:

	1 time or more/week	1 or 2 times /month	a few times per year	rarely to never
St. Albans City	____	____	____	____

St. Albans Town	____	____	____	____
Other parts of Franklin County	____	____	____	____
Chittenden County	____	____	____	____
Grand Isle County	____	____	____	____
Other parts of Vermont	____	____	____	____
Other states	____	____	____	____
Canada	____	____	____	____
Internet	____	____	____	____
Catalog/Mail Order	____	____	____	____

7. Rate downtown St. Albans on a scale of 1 to 10, with 1 being poor and 10 being excellent on the character of its shopping environment.

	Poor							Excellent		
Quality of retail	1	2	3	4	5	6	7	8	9	10
Variety of retail	1	2	3	4	5	6	7	8	9	10
Quality of restaurants	1	2	3	4	5	6	7	8	9	10
Variety of restaurants	1	2	3	4	5	6	7	8	9	10
Personal service	1	2	3	4	5	6	7	8	9	10
Friendly service	1	2	3	4	5	6	7	8	9	10
Prices	1	2	3	4	5	6	7	8	9	10
Convenient parking	1	2	3	4	5	6	7	8	9	10
Amount of Parking	1	2	3	4	5	6	7	8	9	10
Feeling of safety	1	2	3	4	5	6	7	8	9	10
Overall attractiveness	1	2	3	4	5	6	7	8	9	10

Traffic circulation	1	2	3	4	5	6	7	8	9	10
Sidewalks	1	2	3	4	5	6	7	8	9	10
Crosswalks	1	2	3	4	5	6	7	8	9	10
Upkeep of buildings	1	2	3	4	5	6	7	8	9	10
Maintenance of sidewalks	1	2	3	4	5	6	7	8	9	10
Maintenance of parking	1	2	3	4	5	6	7	8	9	10
Convenient hours	1	2	3	4	5	6	7	8	9	10

8. How strongly do you agree or disagree with the following statements about Downtown St. Albans;

	Strongly Agree	Somewhat Agree	Nuetral	Somewhat Disagree	Strongly Disagree
Downtown is the heart of the community	μ	μ	μ	μ	μ
I am optimistic about the future of downtown	μ	μ	μ	μ	μ
I feel safe downtown (even at night)	μ	μ	μ	μ	μ
I always try to buy locally	μ	μ	μ	μ	μ
Downtown employees show great customer service	μ	μ	μ	μ	μ
Regular events enhance the appeal of downtown	μ	μ	μ	μ	μ
Large annual events enhance the appeal of downtown	μ	μ	μ	μ	μ
I want more specialty/unique shopping downtown	μ	μ	μ	μ	μ

I want more day-to-day goods downtown μ μ μ μ
μ

I want more restaurant options downtown μ μ μ μ
μ

A strong retail presence in downtown is important μ μ μ μ
μ

9. When you park downtown, please indicate where you usually are able to find a spot:

on the street in front of the store(s) I'm visiting ____
on the street a block or two from the store(s) I'm visiting ____
on the street more than a block or two from the store(s) I'm visiting ____
in a parking lot and walk from there to the stores ____

10. Please answer yes or no to the following questions:

I like to park in one spot and browse the shops yes___ no___
I like to park directly in front of the shop I'm visiting yes___ no___
I walk/bike or use other transportation downtown yes___ no___
I avoid going downtown because of parking yes___ no___
If I can't find a place after driving through,
I give up and go somewhere else yes___ no___

11. What are your thoughts on store hours (check all that apply)?

I'm satisfied with the store hours of the shops downtown yes___ no___ DK___
The stores downtown are not open when I'm able to shop yes___ no___ DK___
I would shop downtown more often if stores were open later yes___ no___
DK___
I shop elsewhere because of the store hours downtown yes___ no___ DK___

12. Please indicate how increasing or creating the following community components would impact downtown…

Greatly Moderately Neutral Moderately Greatly

	Improve		Improve		Harm	Harm
More Market Rate Housing	1	2	3	4	5	
More High End Housing	1	2	3	4	5	
More Affordable Housing	1	2	3	4	5	
Walking/Biking Trails	1	2	3	4	5	
More surface parking		1	2	3	4	5
More street parking	1	2	3	4	5	
Parking Garage		1	2	3	4	5
More small regularly scheduled events		1	2	3	4	5
More large annual events		1	2	3	4	5
Better directional and wayfinding signs		1	2	3	4	5
More visitor promotion		1	2	3	4	5
Co-operative marketing of downtown		1	2	3	4	5

13. Do you support or oppose the community's efforts to attract businesses, investment, shoppers and events to downtown St. Albans? Are you…

___ Strongly Supportive
___ Moderately Supportive
___ Indifferent
___ Moderately Opposed
___ Strongly Opposed

14. Please indicate the number of times in the past year you have gone downtown to do the following:

___See a movie
___Dine in a restaurant
___Shop for convenience/routine items (drugstore, food, etc.)

___Shop for clothing
___Do specialty shopping (antiques, gifts, other…)
___Go to post office
___Go to bank
___Government function
___Special event or festival

15. What kind of businesses would you like to see downtown? Open-ended

---

16. Please mark the persons gender ____ Male ___Female

17. What is your age range:
___18-24 ___25-34 ___35-49 ___50-64 ___65 and older

18. How many in your household: ___

19. How long have you lived in the St. Albans area?
____ Less than 1 year
____ more than 2 less than 5 years
____ 5-10 years
____ 11-15 years
____ 16+years

20. How many minutes do you live from downtown St. Albans?

0-5 minutes 6-10 minutes 11-15 minutes 16-20 minutes 21+ minutes

21. Are you employed? **(If no, skip to number 23.)**

Yes No

22. In what town is your job most closely located?
St Albans
Other (please specify)

23. What is your household income range: ___under $25,000

___$25,001 to $50,000
___$50,001 to $75,000
___$75,001 to $100,000
___Over $100,000 __Declined

24. Any additional comments they would like to share or add would be greatly appreciated.