



2016

Downtown Fond du Lac Market Study & Plan

Workforce | Residents | Shoppers | Businesses



Background, Process & Thanks

Downtown Fond du Lac has been fortunate to attract a number of new businesses and investment in recent years. These changes, coupled with a changing economy, spurred a desire to better understand the needs, wants and perceptions of downtown users, as well as capture information on the size and nature of downtown's key customer base. The study builds on prior planning efforts completed in 2001 and 2005, and utilizes research conducted by the University of Wisconsin-Extension, Fond du Lac County Economic Development Corporation, Wisconsin Economic Development Corporation and the Downtown Fond du Lac Partnership. These studies were then followed up by surveys to several key groups; downtown workers, residents and businesses. The combination of market data and self-disclosed spending habits and preferences provide a more nuanced picture of the downtown Fond du Lac market. The findings from this research and survey work are provided in this document, along with potential strategies that may help to support additional business activity in the area by capitalizing on areas of strength and addressing areas of real or perceived weakness.

This document is the result of several months of effort from many individuals. Without their time and participation, this document would not have been possible. The Downtown Fond du Lac Partnership would like to thank those who helped with this process. A special thanks to the City of Fond du Lac, the Fond du Lac County Economic Development Corporation, Wisconsin Economic Development Corporation, Wisconsin Main Street and Fond du Lac County University of Wisconsin—Extension for their support and assistance in developing, marketing and evaluating survey results. Additional thanks to those volunteers who helped distribute surveys and conduct business retention visits throughout the community and those that served on our survey steering committee who helped to improve data collection and presentation. Lastly, thank you to the more than 450 individuals who contributed input and insights on how downtown Fond du Lac can remain and improve as a quality place to live, work and visit.





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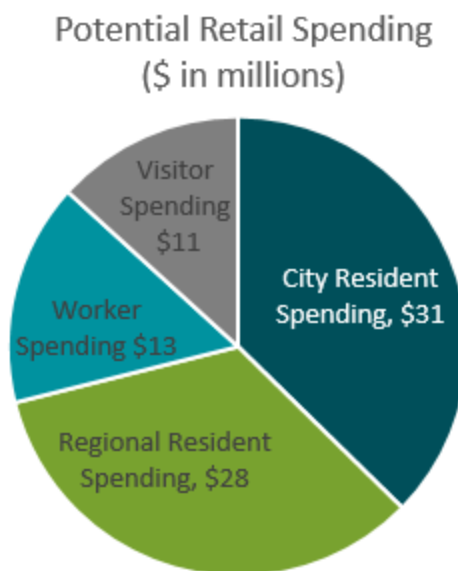


Executive Summary

A number of useful insights were gained as a result of the combination of market analysis, survey outreach and stakeholder interviews conducted as part of this planning process. By combining market information with qualitative information gathered from local consumer groups, the Downtown Fond du Lac Partnership (DFP) is able to craft a more nuanced and effective plan for achieving district revitalization goals.

Downtown Market Overview

Downtown Fond du Lac has demonstrated economic resilience over the long-haul. Although there may be slightly fewer employees working in the core of the city today than in the past, downtown property values have increased at a greater rate than property elsewhere in the city, and downtown remains the hub for customer activity, especially restaurants, where downtown businesses comprise 19 percent of Citywide dining activity. Similarly, although the perception is that downtown retail has declined, there are actually more retail shops and fewer bars in downtown Fond du Lac in 2016 than there were when the DFP was formed in 2004. This economic activity is the combined result of a number of diverse customer groups, as indicated in the chart at right. This unique mix of customers, made possible by a central location and concentration of civic and business amenities, is what differentiates downtown as a business location.



Building on existing clusters, opportunities exist to add businesses in targeted sectors to enhance the range of options available to downtown patrons while also filling gaps in the current business mix. Specific opportunity exists to add retail shops such as clothing, specialty, hobby and general merchandisers, dining options including fine dining, healthy options, quick serve, outdoor dining and coffee shops and entertainment destinations featuring music, family-friendly activities, movies, the arts and high-end drinking places.

In addition to commercial activity, downtown is increasingly becoming a destination of choice for residents. From renovated historic lofts to infill apartment projects, downtown has added 133 new units in the past 14 years, catering to a wide variety of demographic groups, but most notably young professionals and empty nesters.

Downtown Experience

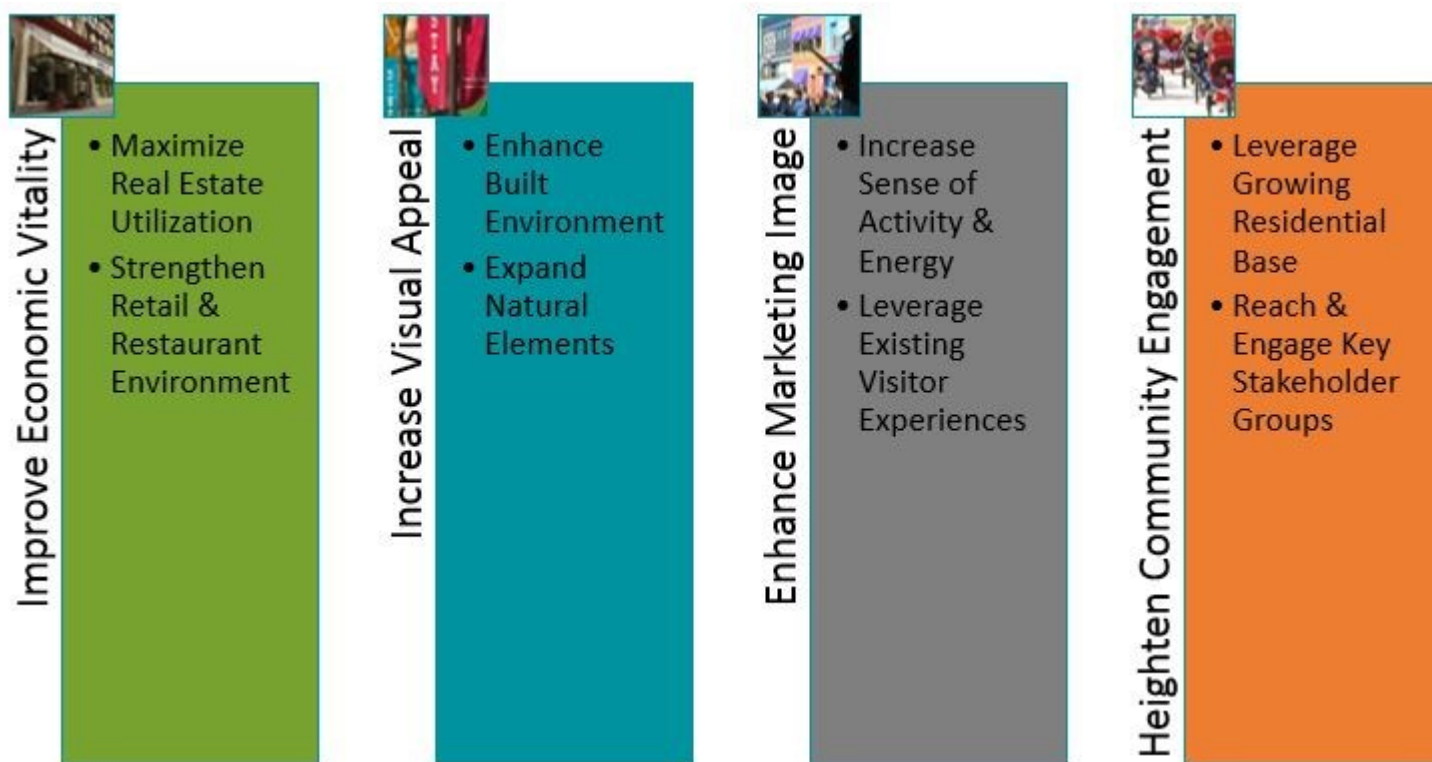
Although economic growth is ultimately a combination of individual business and property owner investments and initiatives, these investments can be leveraged with public and programmatic investments which cause individuals to seek out downtown experiences and linger longer during each visit. The popularity of many of DFP's signature events speak to this desire. In addition to structured events, the location and appearance of physical infrastructure and natural elements as well as the sense of activity created by the presence of other customers together influences the overall perception of a place in the



minds of visitors. The survey identified a number of experiential areas where downtown excels, such as the presence of a pedestrian friendly environment and status as a clean and safe space. It also identified areas which could use improvement, including presenting a positive image to visitors and the presence of attractive storefronts with an increase in shopping and dining options, followed by the creation of a more beautiful downtown identified as the most important near term concern by all visitor groups.

Goals and Objectives

Looking to the future, opportunities were identified within each of the four focus areas of DFP's mission. The following graphic indicates the specific goals which fall within each of these focus areas.



These core areas are intended to represent a comprehensive and continuous approach to improvement, accommodating changes in local stakeholders and economic conditions as work progresses. Although DFP is in many ways the face of downtown, fully recognizing a community vision for downtown will require partnerships between a number of entities for both funding, advocacy and management of various projects. In many cases, these partnerships are well-established, but certain initiatives may require outreach to entities not currently engaged in downtown.

Because DFP has a limited budget and staff, specific initiatives were identified as part of a five-year plan for downtown revitalization. Initiatives are grouped by goal and objective, and also ordered to create a gradual ramp-up in activities within a given area, with future initiatives building upon the success of earlier projects and programs. While some initiatives may require additional capital, such as investment funds to gain control of key properties, install lighting and other public space amenities, or roll out marketing initiatives, others may be completed within existing budgets through strategic use of resources and partner collaborations.

Examples of these low-cost initiatives might include a guest blogger program, establishing sample itineraries to appeal to targeted demographic groups and guerrilla marketing designed to create a sense of vitality and spontaneity downtown.





Downtown Market


Downtown Market Overview

Downtown, now as in history, is a critical piece of the greater Fond du Lac economy. Establishing the precise size and scope of this market is essential for identifying businesses and development types which can be supported now or in the future to address gaps in the local marketplace. By nearly all measures, although it represents only 2 percent of the total geographic area of the City, it has an outsize impact on the City’s economic output. The table below shows the share of City activity according to numerous measures, and also indicates the degree of change over the past decade. In measures such as residential development and shop and restaurant openings, downtown has largely followed City trends. In other areas, most notably property values, downtown has increased much more rapidly, growing assessed values by 8.8 percent as compared to 0.2 percent for the City as a whole. This is all the more impressive given the large percentage of tax exempt properties present in downtown. In contrast, downtown witnessed slower than average growth in new businesses and especially in net employment as other areas of the City attracted manufacturing and service businesses over the past decade. Looking to the future, additional growth in residents and property value is needed to create a balanced and vibrant downtown economy.

Table 2.1: Downtown Economic Performance and Market Share

Economic Indicator	Downtown Measure	Share of City	% Change Past Decade
Housing Units	480	2.5%	8.1%
Residents	756	1.8%	(0.5%)
Property Value	\$72.9 million	2.8%	8.8%
Total Businesses	509	17.8%	(6.2%)
Daytime Workers	3,003	10.5%	(2.2%)
Shops & Restaurants	99	14.0%	(2.2%)

Sources: US Census, County Assessor, Economic Census, ReferenceUSA
*Note that figures may differ from locally calculated sources, but are chosen based on ability to obtain standardized data across geographies and over time.



Demographics & Housing

The downtown market obviously exists within the larger context of regional, state and national economic trends. However, downtowns have a unique market which blends workforce, residential and visitor spending to create a vibrant and 24/7 local market. Understanding these distinct local markets and the interplay between them is important for both local businesses and leaders in order to provide a mix of goods and services that caters to customer needs.

Residential Demographics

Downtown businesses, by virtue of their central location, are able to draw residents from throughout the City and surrounding region. Of course, residents living closer to downtown typically spend a proportionally larger amount of discretionary dollars in the downtown district. The table below illustrates the relative density of residents in downtown, the City and Trade area.

Table 2.2: Total Residential Population by Geography

Downtown	City	Trade Area
756	43,174	82,093

Source: Census, ESRI

The local residential customer base has the following characteristics:

- Median age of 40.6
- Median Household Income of \$59,757
- 93.5% White
- 55% have completed some education beyond high school
- 4.9% Unemployment rate
- 48% White Collar/34% Blue Collar
- 28% Single Households
- 66% Family Households, 21% Include Children

A complete demographic profile for the region can be found in the appendix to this document.

Table 2.3: Existing Housing Supply

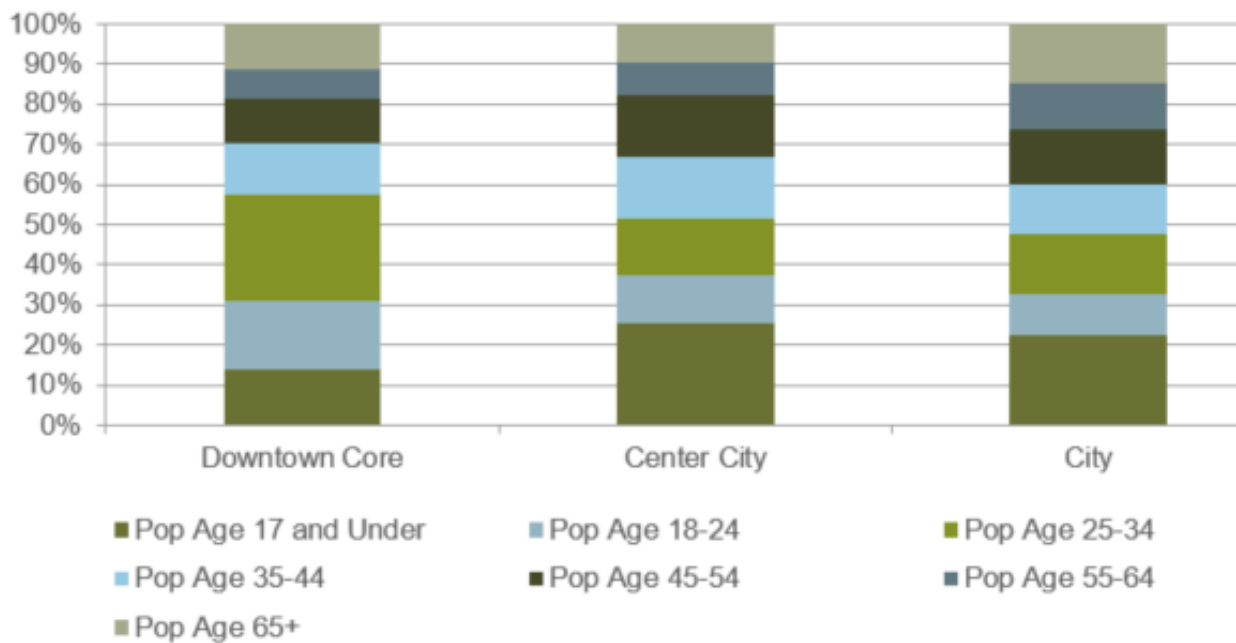
	Downtown Core			Center City			City of Fond du Lac		
	Total Units	Percent Vacant	% Rental/ % Owned	Total Units	Percent Vacant	% Rental/ % Owned	Total Units	Percent Vacant	% Rental/ % Owned
2000	444	7.7%	82.9%/ 17.1%	2,905	7.2%	55.8% 44.2%	17,519	5.0%	38.3% 61.7%
2010	480	10.6%	79.0% 21.0%	3,116	9.1%	42.4% 57.6%	19,407	7.1%	41.8% 58.2%

Source: Census

Residential Trends

Fond du Lac has demonstrated consistent residential growth over the past half-decade. Since 1960, the population has increased by 11,299 residents, while 10,308 new residential units have been added, or 912 new housing units for every 1,000 new residents. For most of this period, the growth in residential units has occurred in new neighborhood and single family development at the expense of multifamily development. Only in recent years has multifamily development increased, with 42 percent of new units built since 1996 being located in buildings of more than five units. Only 7 percent of these units were added in the downtown core, although nearly half were constructed in the center city area. A map showing these two areas is included in the appendix. A significant number of these units are available exclusively to individuals qualifying for affordable units or to seniors, providing minimal options for younger households or downtown employees seeking quality housing in proximity to downtown employment options and amenities.

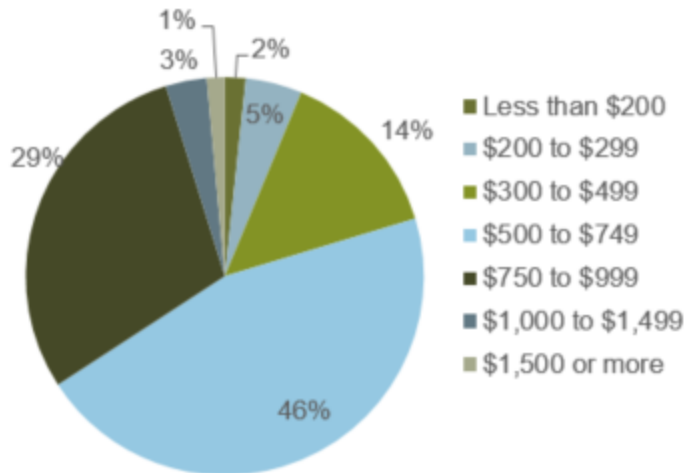
Chart 2.1 Residential Profile by Age



Source: Census

The unit mix in the downtown core is heavily skewed toward rental units, as indicated in the table below. Although this is common for multifamily structures as a whole, the more balanced mix of sale and rental units within the center city indicates that there is demand for owner occupied units in proximity to downtown. A search of MLS listings in the winter of 2014 identified no individual units for sale within the core of downtown, and 23 within the center city, for a 1 percent vacancy rate in the center city. The average asking price of these units (all single family homes), is 57 percent below the citywide average, but represents only 3.7 percent of homes on the market within the City of Fond du Lac.

Chart 2.2 Units by Gross Rental Rate



Source: Census

Residential vacancy information from the census suggests strong demand for multifamily units in downtown, especially rentals. City-wide, apartment units are experiencing sub-10 percent vacancy rates for apartments, a level which is considered to represent market equilibrium by most developers. Although vacancies are slightly higher in the downtown and center city areas, many vacancies appear to be represented by units that have occupancy restrictions such as age or income. In the census, 12 percent of downtown and center city units categorized as vacant in the census were also classified as unavailable either for sale or for rent. A survey of online and other apartment listings in winter of 2014 uncovered only 3 actively marketed rental units available in downtown, and 18 additional units in the center city area, with the vast majority of these available only to households which qualify for income or age-restricted units.

Despite the presence of several senior apartment and assisted living facilities in and around downtown, downtown residents are overall younger than the City as a whole. More than one quarter of residents in the core of downtown are between the ages of 25 and 34, versus only 15 percent Citywide. The population of 18-24 year olds is also higher in both the downtown core and center city than in the City as a whole, as shown in the graph on the following page.

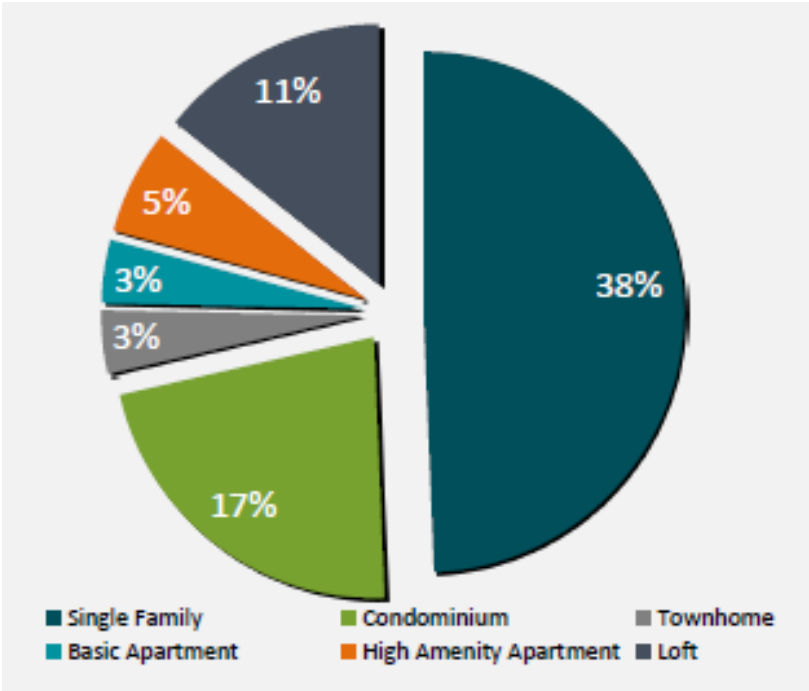
Currently the median gross rent for a Fond du Lac apartment is \$665 per unit. As a whole, this represents an average annual increase of 3.1 percent over the past decade. However, the increase in rent is attributable to an increase in higher end options rather than increasing rates for all units. For instance, the number of units charging between \$750 and \$999 in gross rent increased by more than 450 percent, while the number of units charging more than \$1,000 increased by 142 percent over the decade. The number of units at the lower end of the spectrum (charging \$750 or less) actually declined by 13 percent, indicating that many of these units are no longer in the rental pool (having been demolished, left vacant, or transitioned to owner occupied properties).

Residential Demand Components

Downtown has succeeded in attracting residential development activity, adding 85 new units in the past two years. A 2014 housing study identified present-day demand for 69 additional owner-occupied units, and demand in the next five years for an additional 112 units of all types.

Of the 85 percent of current downtown residents and workers that are open to the concept of downtown living at some point in the future, a majority of them are interested in home ownership, as shown in the chart below. This is especially true of households considering downsizing in retirement. Of the 14 percent interested in downtown living in the near future, interest is more evenly split between ownership and rental units.

Chart 2.3 Residential Living Demand by Unit Type



Source: Workforce & Resident Surveys

Retail Supply & Demand

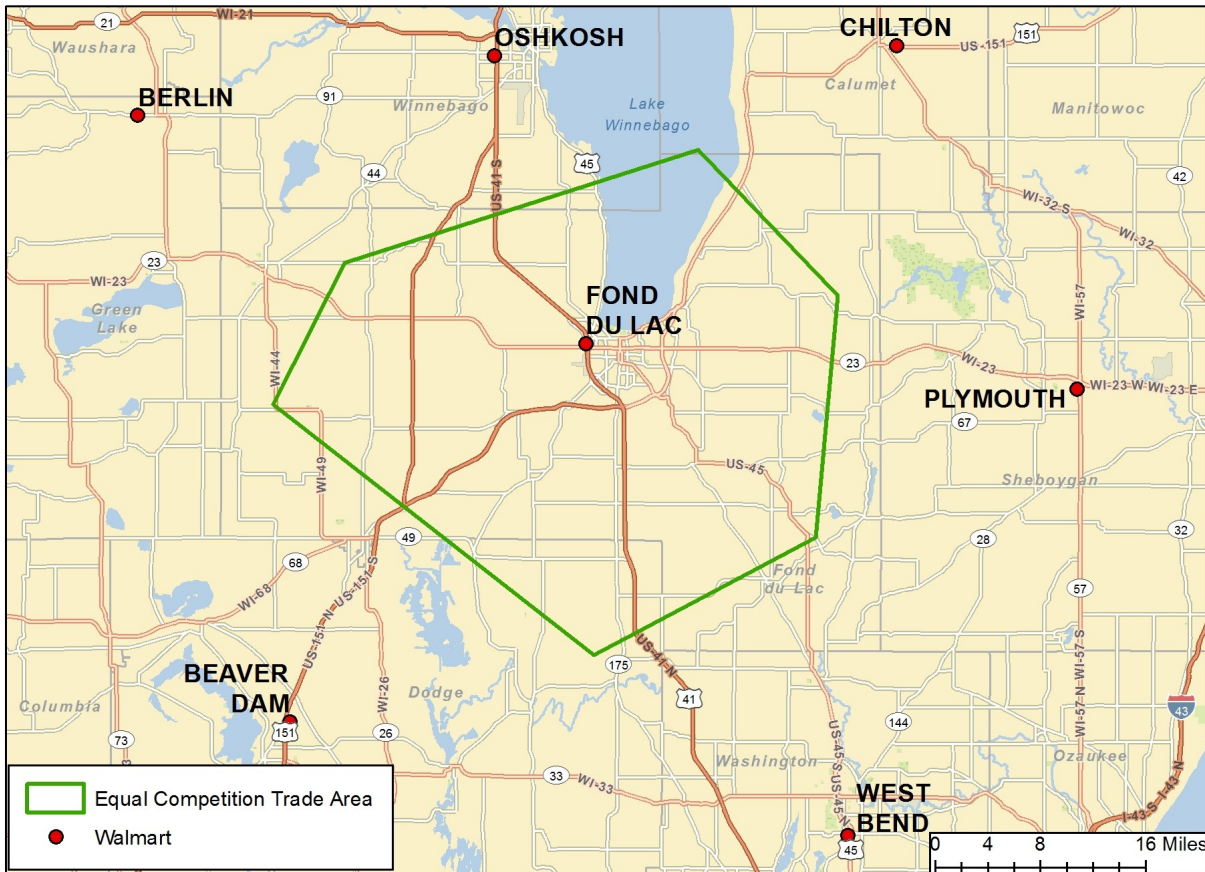
Determining retail demand requires an understanding of the trade area from which a majority of customers will travel. For downtown Fond du Lac, this was done using two different methods. The first method utilized a survey of existing downtown businesses. Responses to this survey indicated that 67 percent of customers originate from within the City, with other primary sources including Oshkosh, Waupun and the area north and east of Fond du Lac commonly known as the Holyland. A secondary method was utilized by the UW Extension, and is based on the relative location of Wal-Mart super centers in the region. The trade area resulting from this tactic is illustrated on the following page. Traditionally, retailers will rely on residents from within this trade area as their primary customer base, with spending by this group comprising between 75 and 80 percent of total sales. This is especially true for convenience retailers, or businesses which provide goods or services required on a regular basis such as grocery stores, gas stations or pharmacies, or for businesses which capitalize on a customer need for convenient and quick service such as fast food or pharmacies. Based on these factors, it is fairly easy to estimate the total customer demand for goods and services that exists within the local trade area, and to compare that with the amount of sales occurring within a given area to determine what existing needs are not being met by local businesses based on trade area population and demographics. Any excess demand means that customers are either traveling elsewhere for these purchases, shopping online, or utilizing substitute goods in place of typical spending (i.e. cooking meals at home rather than eating out). Table 2.4 provides data from ESRI indicating the total potential demand for goods and services in major retail categories within the local trade area, as well as the total supply of goods and services actually being provided in the area, and the share of these sales taking place in downtown. For areas where downtown has a substantial portion of the market, opportunities may exist to further strengthen this position by recruiting additional businesses with a comparable customer base. Note that downtown should not be expected to compete favorably in all categories (i.e. motor vehicle sales are not a suitable downtown use).

Table 2.4: Primary Trade Area Supply and Demand (\$ in millions)

	Trade Area Total Demand	Trade Area Total Supply	Downtown Supply
Motor Vehicle & Parts Dealers	\$254	\$318	\$0.7
Furniture & Home Furnishings Stores	\$30	\$29	\$2
Electronics & Appliance Stores	\$61	\$44	\$0.2
Building Materials, Garden Equipment & Supply Stores	\$53	\$98	\$0.6
Food & Beverage Stores	\$180	\$169	\$1
Health & Personal Care Stores	\$79	\$49	\$1
Gasoline Stations	\$86	\$160	\$0.8
Clothing & Clothing Accessories Stores	\$45	\$31	\$7
Sporting Goods, Hobby, Book & Music Stores	\$27	\$23	\$3
General Merchandise	\$197	\$153	\$0
Miscellaneous Store Retailers	\$40	\$27	\$1
Food Services & Drinking Places	\$108	\$93	\$3
Total Retail Trade , Food & Drink	\$1,183	\$1,200	\$19

Source: ESRI 2016

Equal Competition Trade Area Fond du Lac, WI



Although downtown is home to a number of convenience businesses, it also includes many businesses which are destinations. These businesses, which cater to either a specific market, or offer goods or services required only infrequently, can draw from a much larger trade area, and benefit from locating in proximity to other businesses offering similar or complementary products. Examples of destination businesses might include bridal shops, furniture stores or car dealerships. However, although these businesses attract customers from a broader trade area, the trade area may differ significantly by the type of good in question, making it more difficult to define only one destination trade area that is representative of all downtown businesses.

Based on the retail demand analysis, there are several categories of retail goods and services that are underserved based on the size of the downtown market. These are indicated in the table on the following page, and highlight most clearly the gap in full service restaurants (shortfall of 10) and food to go/snacks (shortfall of 2). There is also a shortfall of businesses providing general merchandise items, which currently only includes offerings at local pharmacies. Note that in some areas there are more current businesses than would be expected given the size of the market. This may be the result of many factors, including the presence of a regional cluster which pulls customers from beyond the typical trade area, businesses which have alternate sales sources (i.e. online or business to business), or to the presence of underperforming businesses.

A secondary way of identifying under-served markets is to evaluate areas of relative strength and weakness in downtown sales as compared to sales elsewhere in the City. In general, these findings support the results of the market demand assessment. This method shows that while downtown businesses represent 8.5 percent of all retail spending in the City, only 4 percent of all home furnishings sales, 1 percent of all food and

beverage spending, and no general merchandise sales occur downtown. Similarly, downtown represents 18.9 percent of all restaurant sales, but only 7 percent of full-service restaurant sales.

In addition to the complications created by the varied trade areas of destination businesses, downtown is fortunate to have a number of additional customer pools which supplement area residents to support local businesses. These include daytime employees, business and leisure travelers and event attendees, all of which are present in the Fond du Lac market and likely to spend discretionary dollars as part of their downtown trip.

As a result of the need to combine multiple diverse markets as part of a comprehensive downtown strategy, a market segment demand analysis was created by the UW Extension. This analysis identifies the total market potential and potential study area capture for each downtown-appropriate business type. The entire report and methodology is provided in the appendix, with a summary of downtown demand by market segment illustrated in table 2.6 on the following page. From these figures, it is clear that although area residents represent the largest share (71%) of total retail demand, visitors comprise more than one-quarter (27%) of total restaurant demand, and visitors and workers together generate potential retail sales sufficient to support more than 25 downtown shops.

Table 2.5: Retail Gap Analysis by Type

Retail Category	Establishments Supportable	Current Establishments
Furniture and Home Goods	2	5
Electronics & Appliance	2	0
Building Materials & Home Improvement	2	1
Food and Beverage	3.5	2
Health & Personal Care	3	2
Gas Stations & Convenience	4	4
Clothing & Accessories	7	7
Sporting Goods, Hobby, Books & Music	2	5
General Merchandise	2	0
Specialty Stores	5	13
Full Service Restaurants	16	6
Limited Service Restaurants	11	14
Snacks	3	2

Source: UW Extension and DFP Business Directory

Table 2.6: Downtown Retail Demand by Market Segment (\$ in 1,000s)

	Trade Area Resident Demand	Worker Demand	Visitor Demand
Furniture & Home Furnishings Stores	\$2,421	\$442	\$255
Electronics & Appliance Stores	\$2,805	\$511	\$296
Building Material and Garden Supply	\$4,031	\$735	\$425
Food and Beverage Stores	\$2,262	\$413	\$239
Health & Personal Care Stores	\$7,401	\$1,350	\$781
Gasoline Stations	\$15,067	\$2,748	\$1,590
Clothing & Clothing Accessories Stores	\$6,337	\$1,556	\$668
Sporting Goods, Hobby, Book & Music Stores	\$2,104	\$384	\$222
General Merchandise	\$1,553	\$283	\$164
Miscellaneous Store Retailers	\$2,654	\$484	\$280
Drinking Places	\$536	\$179	\$264
Full-Service Restaurants	\$6,098	\$2,030	\$2,997
Limited-Service Restaurants	\$5,039	\$1,678	\$2,476
Snack and Beverage Bars	\$841	\$280	\$413
Total Demand	\$59,149	\$12,673	\$11,070

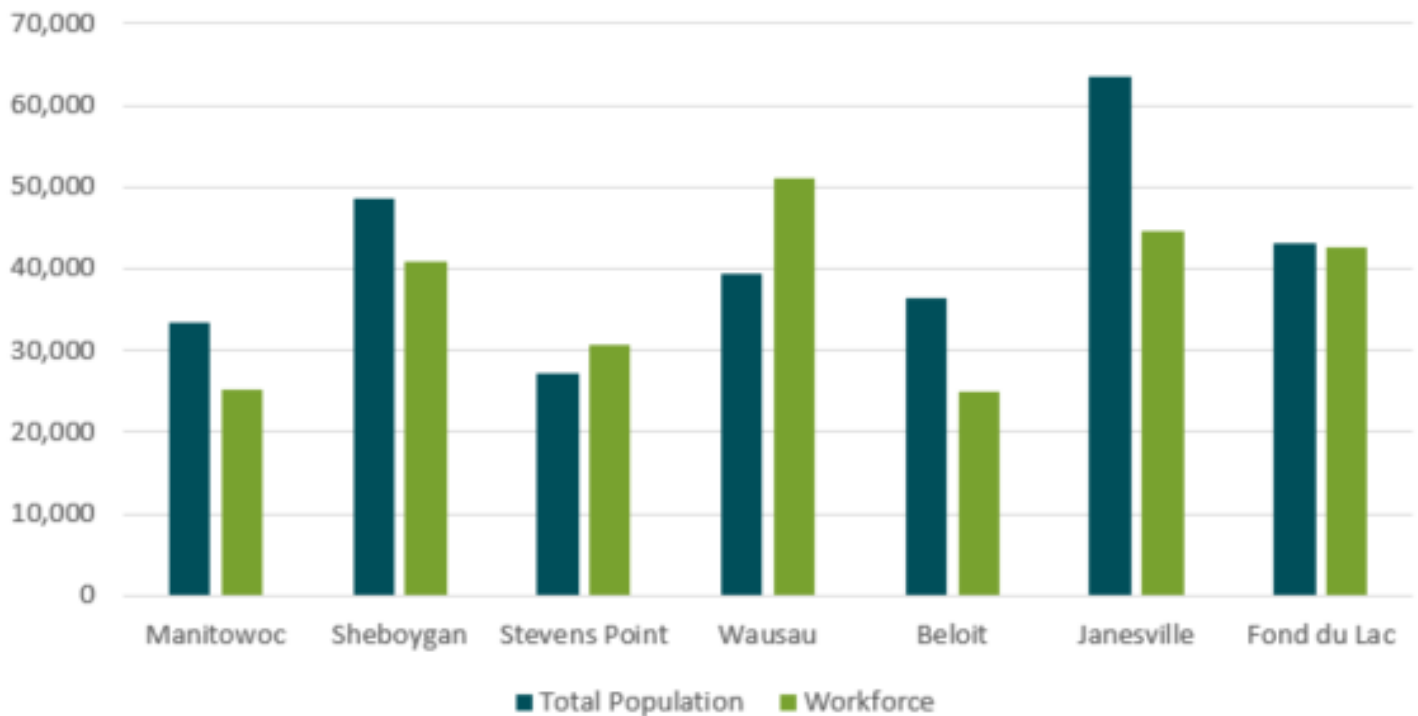
Source: UW Extension, ICSC, ESRI, Census, Wisconsin Department of Tourism

Comparable Community Analysis

As part of the market analysis process, six other communities in Wisconsin were identified as geographically and economically similar to Fond du Lac. These communities were used as the basis for an economic comparison among the competitive set to identify any unique opportunities or challenges which Fond du Lac may face relative to its peers. The cities selected include:

- Manitowoc
- Sheboygan
- Stevens Point
- Wausau
- Beloit
- Janesville

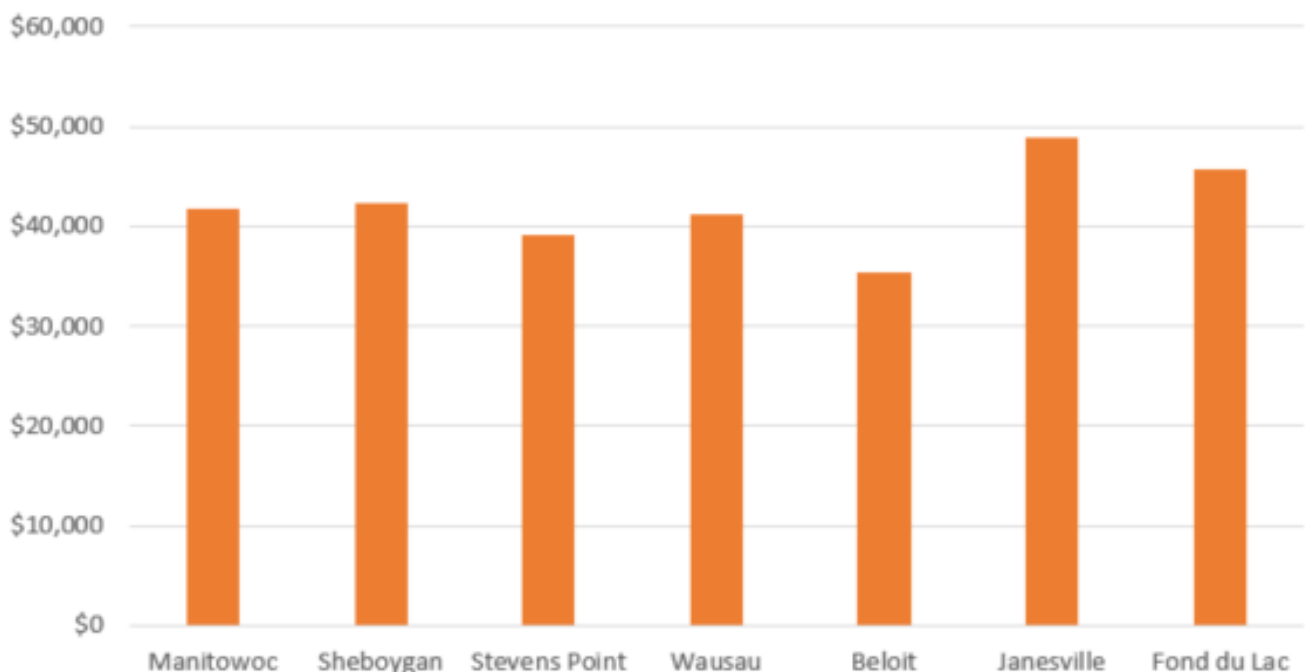
Chart 2.4 Comparable Community Population and Workforce



Source: ESRI

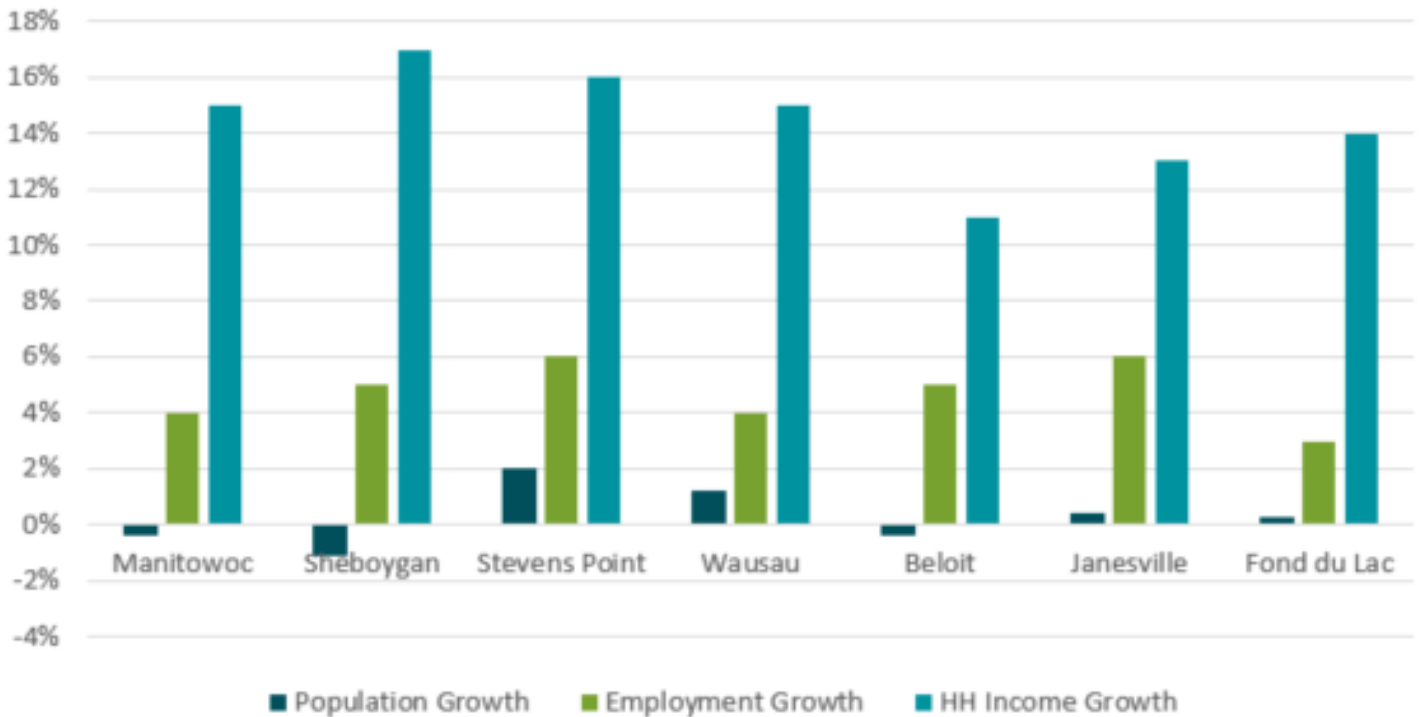
The criteria used to compare these economies included current information and projections related to: total population and households, % families, household and disposable income, net worth, home value, median age, retail spending and employment. During the study period, a group of Fond du Lac representatives also made several trips to visit these comparable cities to determine what local assets or policies contributed to these differences which can be developed or applied locally.

Chart 2.5 Comparable Community Median Household Income



Source: ESRI

Chart 2.6: Change Projections 2015-2020 Key Economic Variables



Source: ESRI

In comparison to these other communities, Fond du Lac compares favorably in terms of income, with the second highest per capita income (\$28,074) and household income (\$51,920). It also has one of the lowest housing vacancy. In terms of both total and family populations, Fond du Lac is in the middle of the pack, behind Janesville and Sheboygan in terms of total population, third in local employment and fourth in the percentage of family households, and virtually tied with all but Manitowoc and Stevens Point when it comes to percentage of family households, as the remaining communities all have between 70 and 78 percent family households.

Looking to the future, many of Fond du Lac's leading indicators are slightly weaker than in other communities. For instance, employment is only expected to grow by 3 percent in the next five years, versus 4-6 percent in comparable communities. While Fond du Lac's population is also anticipated to grow in the next five years, this growth will occur only at a negligible rate, in contrast to stronger growth in both Stevens Point and Wausau. Per capita and household income are also anticipated to grow at a slower than average rate, with only Janesville and Beloit growing wealth at a slower pace, as shown in the chart on the following page.

In addition to comparing the economic performance of Fond du Lac and peer communities, representatives from various economic development partners in Fond du Lac visited peer communities and met with local stakeholders in each to identify opportunities and best practices which may be relevant to future local efforts. The best practices captured during these visits have been categorized based on their intended outcome and summarized in the table on the following page.

Table 2.7: Comparable Community Best Practices

Business Assistance	Residential Support	Development Assistance
Stevens Point has a façade grant program up to \$30,000 with a 50% match.	Wausau and Sheboygan are both working on large scale residential developments downtown. Both communities assembled the land and sought out developers via RFP process.	The Wausau Area Foundation loans money to the City for economic development. The City uses these funds to buy property and repay with future tax
Sheboygan offers a \$1,000 sign grant to businesses, but requires design review for renovations impacting more than 20% of the façade.	Wausau also offers the Live It Up Wausau program which partners with local employers to provide public-private no interest loans for employees relocating to the community and purchasing. They also use the HOME program to assist with upper floor	All of the comparable communities have (or recently had) downtown tax increment finance (TIF) districts in place to fund larger downtown improvements.
Wausau hosts an annual ICSC conference to attract developers and retail representatives to experience the City.	Sheboygan has the Someplace Better campaign in partnership with the Chamber and EDC. There are 2,400 open positions in the County, and this program works to attract people to fill	Sheboygan, Wausau and Beloit all recently purchased key properties and issued an RFP for new development meeting an identified need in the community.
Sheboygan hired a team of recruiters to visit businesses in nearby communities on their retail hit list armed with local market	Sheboygan's CVB hosted a two-day tour of the community for realtors to allow them to sell the community to prospects more effectively.	
Wausau has a Business Insights team to consult with new businesses. Includes legal, accounting and marketing professionals.		

Survey Results

It is important to understand the downtown market in terms of the perceptions of its users. While market information can indicate areas where downtown may be performing exceptionally well or poorly, it is often difficult to determine why this is occurring without gathering additional information on consumer trends, commuting patterns, the presence of local and regional competition and the needs and wants of the local population.

In addition to providing critical clarifying data to explain market trends, surveys can help to uncover trends in the marketplace before they are reflected in measurable information. For instance, the level of consumer interest in specific residential or retail options, or the degree of optimism or pessimism for the future among existing business owners can provide important information about emerging trends which may impact downtown performance in the future and present specific opportunities or challenges.

In order to obtain a more thorough picture of the downtown market, two separate market surveys were conducted of key downtown consumer groups—residents and workers. In total, more than 400 responses were provided to these surveys. Additionally, individual interviews and surveys were conducted with 59 downtown businesses from a variety of industries and geographic locations. The information included within this chapter was obtained from these survey instruments.

Downtown Activity Patterns

Residents and workers both represent a captive audience for downtown businesses. Not surprisingly, there was significant overlap between the most popular downtown destinations between the two groups. Those businesses and sites that were most frequently cited as regular destinations by both groups are indicated in the word cloud below, and include predictable destinations such as the library, YMCA and post office, as well as popular businesses such as BagelMeister, Mix it Up Bakery and Lillian's. The Farmers Market was also listed by numerous individuals as a primary destination .

Chart 3.1: Popular Downtown Destinations

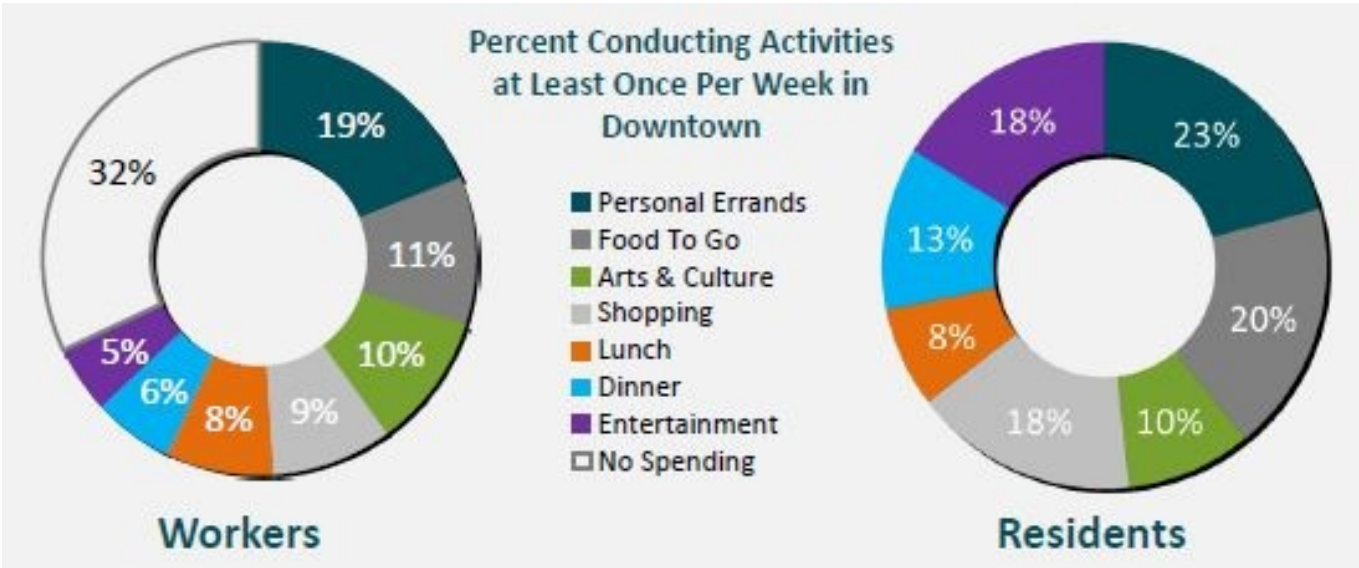


However, despite these commonalities, there are some significant differences in current spending patterns among residents and workers. Most strikingly, residents are more frequent customers of all types of downtown businesses. As shown on the chart below, more residents than workers make trips to each category of downtown businesses. Nearly one-third of downtown workers did not report regularly patronizing downtown businesses of any type on a frequent basis. An alternate way to evaluate downtown activity trends is to identify those goods, services and activities which customers are equally or more likely to undertake downtown given the size of the market as compared to those where customers virtually always travel elsewhere. These businesses/destinations may represent an opportunity to build on existing traffic to cross-promote related businesses and/or build an activity cluster around these types of activities in downtown. There are several sectors which attract customers to downtown on a regular basis, including:

- Arts and Cultural Activities
- Parks and Recreation
- Running Professional Errands
- Eating Dinner in a Restaurant (especially residents)
- Running Personal Errands (especially workers)

Many other activities such as grocery shopping and general merchandise shopping, it is unlikely that downtown will overtake other convenience destinations for these activities. However, there is some opportunity to grow market share specifically for consumers seeking to eat lunch out and pursue children’s activities. There were no primary competing destinations identified for these activities, and many complementary activities already exist downtown.

Chart 3.2: Downtown Worker and Resident Spending Habits



Source: Workforce & Resident Surveys

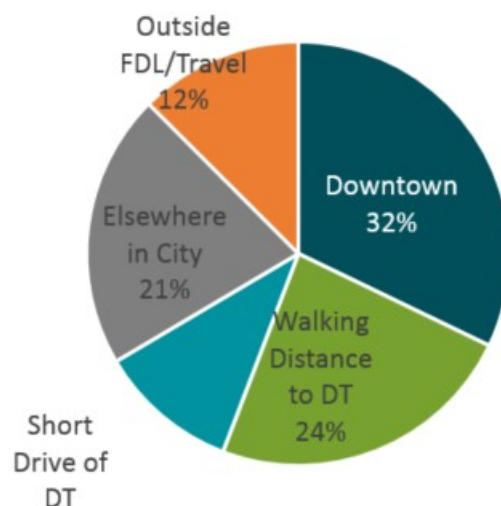
Workforce

Of the approximately 3,000 employees estimated to work downtown, 227 participated in the 2016 survey. While the distribution of the survey focused on downtown employers, individuals from downtown proper businesses, center city businesses, and workers primarily employed elsewhere but which regularly conduct business in downtown responded to the survey, resulting in a geographically diverse mix of respondents.

Regardless of where respondents work, the majority live in or within close proximity of the City of Fond du Lac. A full 47 percent of respondents travel between 2-5 miles to work, 21 percent travel 6-10 miles, and an additional 21 percent travel more than 10 miles each direction. Despite the general proximity, only 11 percent of workers reported living in downtown. Based on an analysis of zip codes reported by commuters traveling 6 miles or more to work, one quarter travel from the urban/suburban neighborhoods within 54935, one-third travel from the more rural 54937, and the remainder travel from larger municipalities in a variety of directions, including 6 percent which travel daily from the Madison or Milwaukee metropolitan areas.

Demographically, respondents represent a wide range of ages and incomes, although more women than men responded to the survey (70% female/26% male), and respondents overwhelmingly represent long-time Fond du Lac residents (80 percent have lived in the City longer than 10 years). This is in contrast to the residents, many of whom are new to the area. Worker households tend to also be slightly older and, as a result, to have slightly higher incomes than resident households. The following tables provide a demographic profile of survey respondents.

Chart 3.3: Worker Place of Employment



Tables 3.1-4: Worker Demographics

Percent of Workforce Respondents by Household Type	
Live Alone	12%
Live with Significant Other/Married	81%
Nonfamily Household	8%

Percent of Workforce Respondents by Presence of Children in Household	
Children Live at Home	48%
Children Over 18	24%
No Children—Future Plans	6%
No Plans for Children	22%

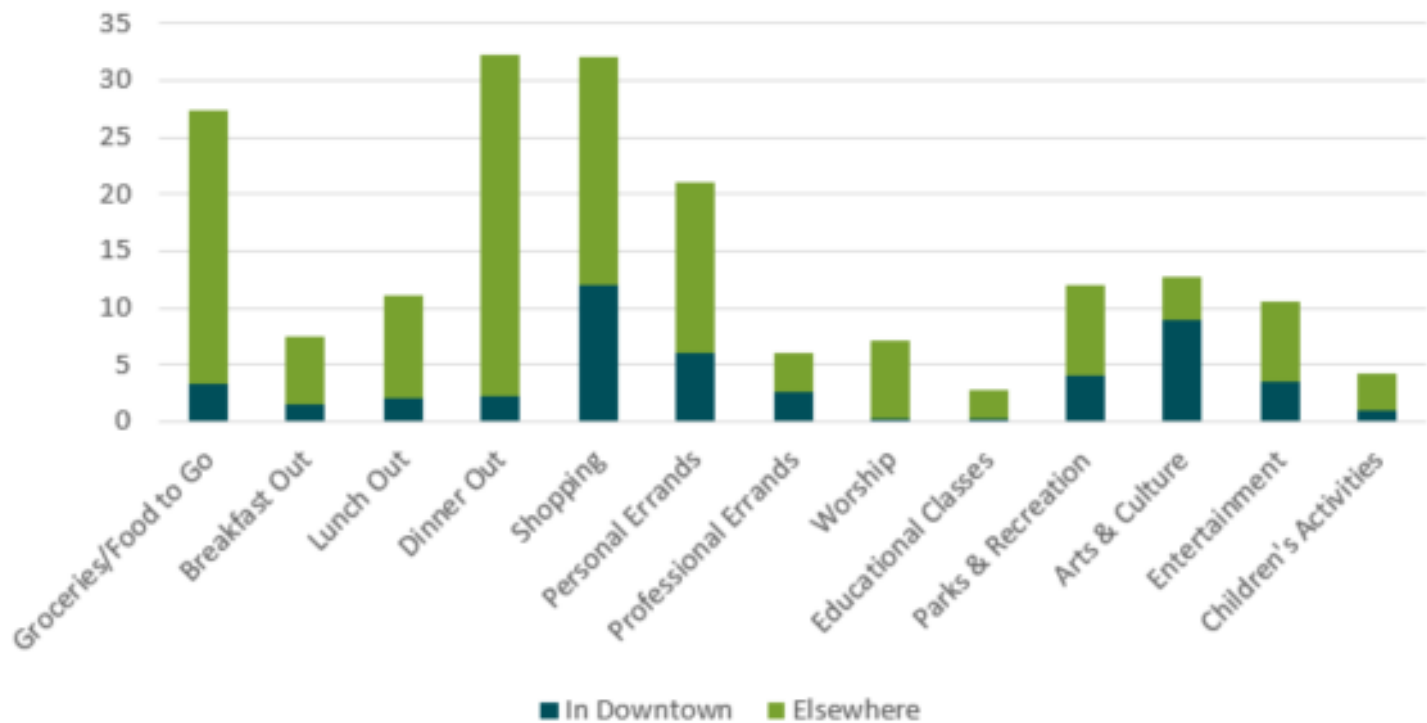
Percent of Workforce Respondents by Annual Household Income	
Under \$25,000	3%
\$25-\$34,999	6%
\$35-\$49,999	11%
\$50-\$74,999	18%
\$75-\$99,999	23%
\$100-\$149,999	23%
\$150-\$199,999	10%
\$200,000 and	6%

Percent of Workforce Respondents by Age of Worker	
24 and Under	1%
25-34	16%
35-44	27%
45-54	30%
55-64	21%
65 and over	6%

Worker Spending Habits

Downtown employees represent a significant source of potential customers for downtown businesses. A 2013 study by the International Council of Shopping Centers found that the average employee spends between \$60 and \$90 weekly on in-person purchases associated with their work day (including commuting periods). For this reason, employees were surveyed regarding their spending habits both in and out of downtown, as well as their perception of the quality and selection of various business types within downtown. In general, downtown employees conduct a majority of their spending in virtually every category outside of downtown.

Chart 3.4: Worker Activity Frequency by Destination



The graph above compares the overall frequency with which workers perform each type of event both in and out of downtown. The most frequently conducted activities downtown are shopping and Arts & Culture activities, followed by personal errands (note that personal errands are conducted by more people overall, those that do shop do so more frequently). Arts and Culture is the only type of activity which is conducted more frequently downtown as a whole.

Tables 3.5-6: Selection & Quality of Downtown Offerings

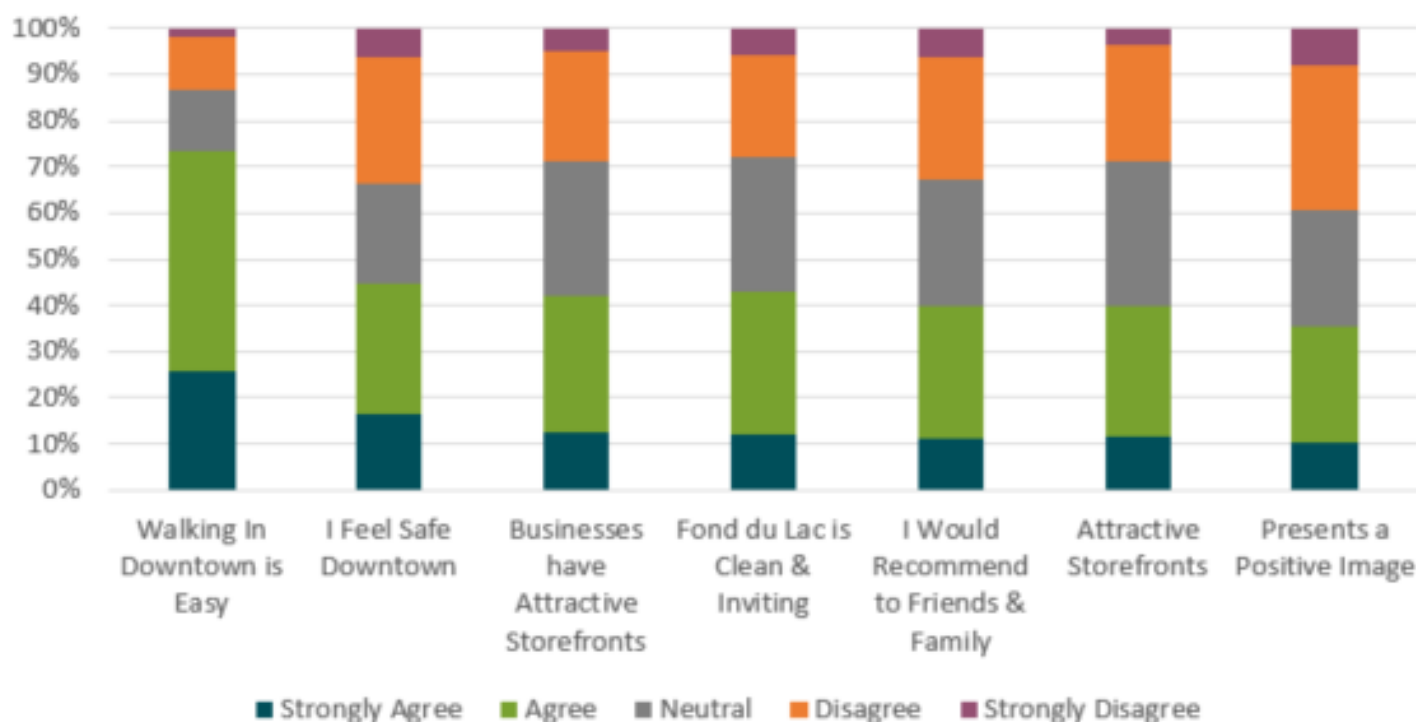
	Percent High Quality	Percent Low Quality	Average Ranking (1=poor, 3=excellent)		Percent Excellent Selection	Percent Poor Selection	Average Ranking (1=poor, 3=excellent)
Grocery/Food to Go	9%	30%	2.4	Grocery/Food to Go	3%	74%	1.5
Restaurants	21%	13%	2.2	Restaurants	6%	47%	1.7
Shopping	14%	28%	2.2	Shopping	2%	63%	1.5
Services	18%	16%	2.5	Services	7%	29%	2.1

Although many workers indicated that greater selection of businesses in many categories is desirable, more than 140 individual businesses or establishments were identified as common destinations. The most frequently mentioned destinations (mentioned by more than 20 respondents) included the Library, Bagelmeister, Lillian's, Fat Joe's, and the YMCA. Interestingly, the mix of destinations identified by workers did not substantially differ from the list provided by residents. The most frequently cited outside destinations which attracted consumers elsewhere for purchases included other shopping areas within Fond du Lac (Forest Mall, West Side, Johnson Street) and external retail centers such as Appleton and Oshkosh. Specific businesses identified as alternate destinations largely included national chain businesses, with the exception of the Backyard Bar & Grill, which was a frequently mentioned local destination.

Worker Perceptions of Downtown

Workers were surveyed regarding their perceptions of retail and service goods and services available in the district, as well as their overall perception of downtown as a place to visit and spend time. Overall, workers find downtown to be a pedestrian-friendly destination that is also safe, clean and inviting. However, many workers also feel that downtown does not always present a positive image to visitors, and that storefronts could be more attractive. Chart 3.5 ranks performance on a number of factors from most to least favorable. An additional question asked about whether downtown was bicycle friendly, but half of respondents were either neutral or had no opinion of cycling in downtown.

Chart 3.5: Overall Downtown Perception



When asked specifically about the quality and selection of businesses available downtown, quality was perceived as slightly more favorable than selection. However, while between 10 and 20 percent of respondents indicated that there were quality options available in each category, the majority of responses indicated adequate quality. In contrast, with the exception of services, which had adequate selection as well as quality, the remaining categories were rated as having poor selection by 47 percent or more of respondents. These findings are likely correlated with the high percentage of workers who do not regularly conduct any regular shopping or dining activities downtown.

Many respondents also elected to provide written comments indicating either general or specific types of businesses which were missing from downtown but which they would frequent if available. The below bullets summarize this feedback.

- **Restaurants:** To-go meals, ethnic cuisine, healthy options, quick lunches and upscale venues
- **Entertainment:** Additional upscale bar options, music venues, events
- **Shopping:** Specialty shops, clothing

As indicated previously, workers do not shop or dine downtown as frequently as residents, and also indicate that a lack of selection may contribute to this trend. Workers were also asked to specifically identify improvements which would cause them to shop and dine more frequently. The responses to this question are provided in Table 3.7. A follow-up question also asked respondents to identify the days and times of the week when they are most likely to run errands/perform shopping trips. These responses were somewhat counter to the results provided in this chart, in that only 29 percent indicate that they prefer to conduct shopping trips in the evening. Based on this data, increased Saturday hours may have an equivalent benefit in capturing shopping traffic.

Preferred Hours for Shopping and Running Errands:

- During the Business Day: 29%
- Weekday Evenings: 29%
- Saturday: 29%
- Sunday: 3%

Table 3.7: Strategies for Increasing Worker Spending

	% Responding Positively
Restaurants Open Earlier (More Breakfast Options)	17%
Longer Lunch Break (Time to Visit)	17%
Restaurants Open for Lunch (More Lunch Choices)	21%
Shops Open After Work	50%

Source: Workforce & Resident Surveys

When asked to identify specific priorities for improving the look and feel of downtown, the clear choices were more and improved restaurants and more and improved shopping, with more than half of individuals selecting one or both of these options as among their top three priorities. A distant third and fourth priority were more convenient parking and a cleaner and more beautiful downtown, each of which received votes from roughly one-quarter of respondents. It is worth noting that the workforce was the only audience which identified parking as either a top priority or concern.

Worker Residential Market Demand

A final component of the survey asked workers about their potential interest in downtown residential options, either now or at some point in the future. Although only 9 percent of workforce respondents were interested in downtown residential options in the near term, 44 percent would potentially be interested at some point in the future.

The largest share of individuals interested in downtown living would be primarily interested in owner-occupied choices, whether single family (28%) or condominium (18%). An additional 10 percent are interested in historic loft living, either rental or owned. The most desirable unit size was 2-3 bedroom with 2 baths, with buildings including garage parking and private entries and which are pet-friendly. Depending on the type of unit desired, respondents were willing to pay between \$600 and \$1,000 per month in rent or mortgage costs. As a point of comparison to these future desires, 91 percent of respondents currently live in a single family home, five percent in a traditional apartment, and the remainder in some type of multifamily structure. Only eleven percent currently rent their unit, either an apartment or townhome unit.

Resident Survey

The survey of downtown and center city Fond du Lac residents resulted in 191 survey responses. Respondents were asked to self-identify their residential location, with 20 indicating that they live downtown, an additional 112 living within walking distance of downtown, and 42 living within a short drive of downtown. An additional 17 respondents live elsewhere in the City. Geographically, respondents are fairly well dispersed among the quadrants of downtown.

A majority of respondents are long-time residents of the area, although 15 percent have relocated to downtown in the past 2 years, and another 12 percent within the past 5 years. Newer residents tend to be younger overall, and more concerned with entertainment and nightlife options as well as residential option diversity and quality than other groups.

More than half of respondents (55 percent, generally corresponding to single family home owners) live with a significant other, while just under 1/3 live alone. The remaining 13 percent live with roommates or other family members. Not surprisingly, 50 percent of those living with roommates are under age 34, while just under 40 percent of those living alone are over age 55.

A large percentage of respondents living near downtown work in close proximity to their residence – 12 reported working primarily from home, and an additional 26 individuals commute less than 1 mile, with a total of 38 percent commuting 5 miles or less. This is in contrast to the worker survey, which found fewer downtown employees living in proximity to downtown. Additionally, 40 individuals are not currently employed, three-quarters of whom are presumed retired based on their age. Among those commuting elsewhere, 38 percent still work within the City of Fond du Lac or surrounding towns, while the remainder commute to a wide variety of regional destinations.

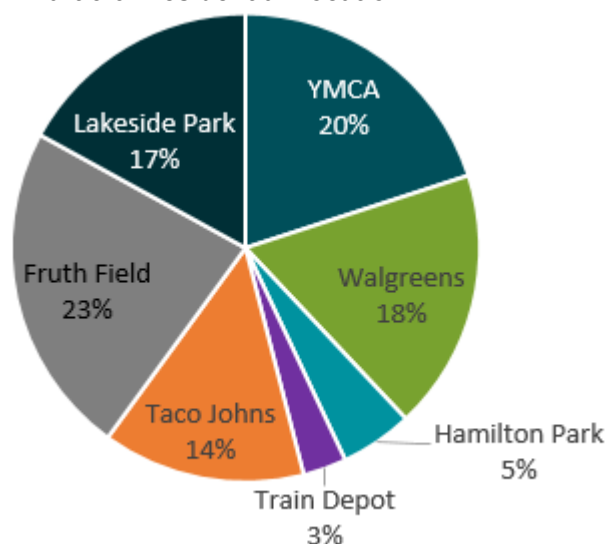
Current Activity Patterns & Perceptions

Respondents were asked to respond to a number of questions regarding their current activity patterns. The first question addressed the most common destinations (businesses or locations). The responses to this question were largely similar to the worker survey, with a few exceptions. Residents were much more likely to identify healthcare destinations, convenience stores/pharmacies, fitness centers, the Farmers Market and local parks as primary destinations, and also somewhat more likely to identify casual dining destinations as opposed to bars or more formal restaurants. The most frequently cited destinations largely overlap with those of the workforce, although convenience activities such as pharmacy and banking are mentioned more frequently by residents, and the frequency of all activities is higher for residents than workers, as evident in the chart in the executive summary which points to the 18 percent or greater of residents who conduct shopping, personal errands, entertainment and the purchase of food to go downtown once a week or more.

When asked about those activities which they undertake downtown versus elsewhere, residents, as with workers, continue to travel elsewhere for a majority of activities. The only areas where residents pursue activities downtown with any frequency are:

- Arts and cultural activities (41% downtown versus 31% elsewhere)
- Visiting parks and recreation areas (35% do this downtown frequently versus 57% elsewhere)
- Eating dinner in a restaurant (25% do this frequently downtown versus 48% traveling elsewhere)

Chart 3.6: Residential Location



Source: Workforce & Resident Surveys

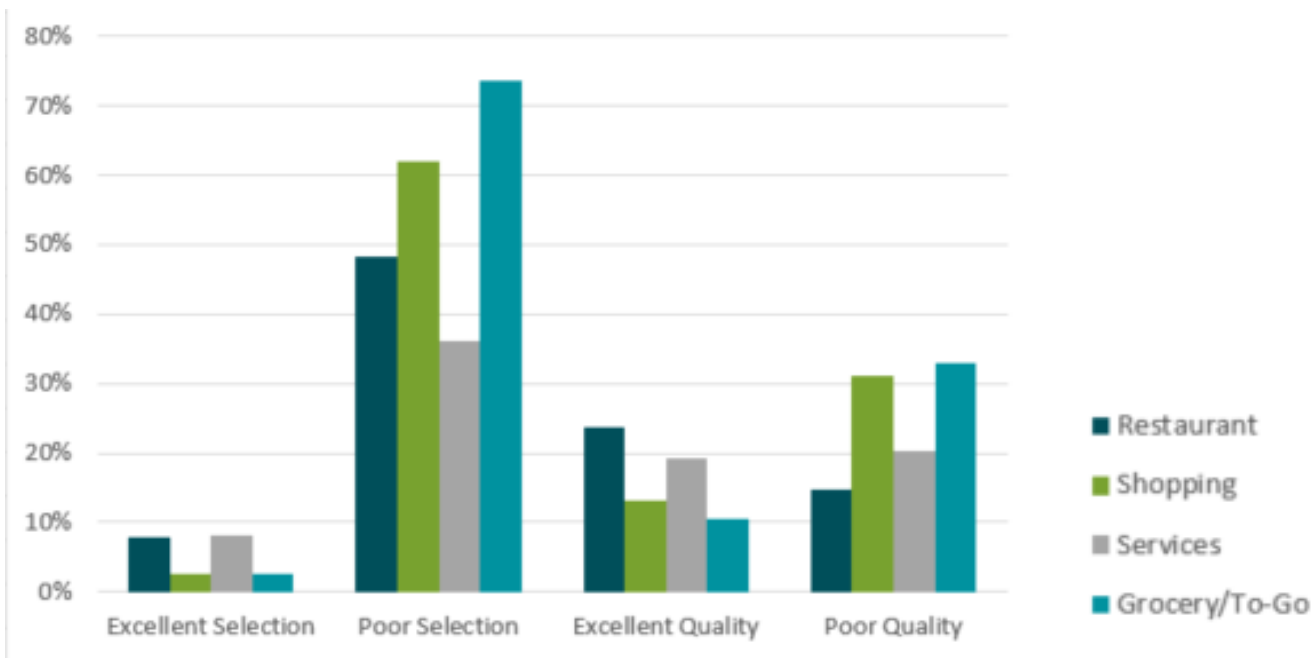
For those trips where downtown area residents travel elsewhere for goods and services, common destinations are similar to those identified in the workforce survey, with the exception of the fact that far fewer downtown area residents identified outside cities as a primary destination, instead identifying stores or centers elsewhere in Fond du Lac. Common destinations include grocery stores, businesses (Target, Wal-Mart, Backyard Grill) or centers (primarily Forest Mall & vicinity).

Lastly, residents were asked to rate the quality and selection of individual business types downtown. The overall rankings were as follows:

- Services, which 54% ranked as adequate or excellent.
- Restaurants, which 80% identified as adequate or excellent (50% adequate).
- Shopping and Grocery/To-go options , with 35% and 38% respectively indicating that these options were of poor quality.

With regard to selection, rankings were largely reflective of the previous rankings, although every category was ranked more poorly in terms of selection. More than 50% of respondents identified all categories as lacking in selection.

Chart 3.7: Perception of Business Selection & Quality



Source: Workforce & Resident Surveys

There was some variation in response to this question based on the residential location of the respondent. For instance, residents living near the train depot ranked restaurant quality as poor, while residents near YMCA and Taco Johns feel that the quality of options is excellent. Similarly, residents of Lakeside Park, train depot and Hamilton Park areas indicate that grocery and to-go food options are poor, while residents near Fruth Field are more positive about the quality of these options. A more detailed chart comparing these perceptions is provided on the following page.

Table 3.8: Retail Selection & Quality By Geography

Residential Area	Quality Excellent	Quality Poor	Selection Excellent	Selection Poor
YMCA	Restaurant Shopping			Grocery/To-Go
Walgreens				Grocery/To-Go Restaurant Shopping Services
Hamilton Park	Shopping Services	Grocery/To-Go		Grocery/To-Go Shopping
Train Depot		Grocery/To-Go Restaurant	Grocery/To-Go	
Taco Johns	Restaurant		Restaurant	Grocery/To-Go
Fruth Field	Grocery/To-Go Services			Grocery/To-Go Restaurant Shopping
Lakeside Park		Grocery/To-Go Restaurant Services		Grocery/To-Go Services

Source: Workforce & Resident Surveys

Future Priorities

Respondents were asked to identify three specific businesses or amenities currently lacking from the downtown which they would visit if available. As compared to the worker survey, residents were much more specific in their responses to this question. Priority recruitment targets included many of the same targets (31 percent identified restaurants and 29 percent identified shopping), as well as some additional desired improvements. New additions included 17 percent seeking entertainment options, with specific options including painting studios, arcades, child-friendly play areas, movie theaters, etc. Another 13 percent identified grocery stores as a primary target, while 5 percent specifically requested higher-end bar/lounge options, whether a brew pub, music venue or other upscale option. For those options where workers and residents agree, the most commonly requested restaurant types included healthy options, family friendly options and coffee shops, while clothing and specialty shopping were also priorities. There were a significant number of area residents requesting child-friendly shops, entertainment and park spaces in downtown. This reflects not only the 37 percent of respondents who report having children living in their household present, but also the 3 percent who have children living primarily elsewhere and the 15 percent with older children

Table 3.9: Downtown Priorities by Demographic Group

	Young Professionals (Age 18-34)	Family Households (35-54 with children)	Older Households (Age 55 and Over)	Workers
Top Priority	Cleaner & More Beautiful Downtown	More/Improved Shopping	More/Improved Shopping	More/Improved Restaurants
Second Priority	More Nightlife/ Arts & Culture (tie)	More/Improved Restaurants	More/Improved Restaurants	More/Improved Shopping
Third Priority	More/Improved Restaurants	More Family Friendly Amenities	Cleaner & More Beautiful Downtown	More/Improved Parking

Source: Workforce & Resident Surveys

and/or grandchildren visiting. Respondents would be most likely to frequent these establishments weekdays (37%) weekday evenings (28%) and Saturdays (27%).

When asked to identify strengths and weaknesses of downtown currently, respondents identified several areas of strength, including:

- Downtown is pedestrian friendly (30% strongly agree)
- Downtown is bike friendly (15% strongly agree)
- Businesses have appropriate and adequate hours (14% strongly agree and 29% agree)
- Downtown is safe, day and night (14% strongly agree and 27% agree)

Downtown performed adequately with regard to a perception of downtown as clean and inviting and a desirable place to bring visitors. The two lowest scoring areas were:

- Businesses have attractive storefronts (38% disagree or strongly disagree)
- Downtown presents a positive image to visitors (54% disagree or strongly disagree)

Overall, respondents identified two major priorities, the same priorities identified by the workforce – improving quality and selection of shopping and restaurants downtown, distantly followed by a desire for increased beautification and parking improvements. Of course, priorities change over time. Although there is some agreement among age groups, there are also variation in areas of focus that different demographics would like to see in the next five years. Table 3.9 on the previous page highlights areas of agreement and difference with regard to desired downtown improvements, with areas of agreement color coded for clarity. Other filters of priorities indicated that residents of downtown are in general agreement with the need for improved restaurant and shopping options, as well as aesthetic improvements. However, this group also has the strongest support for additional festivals and events of any segment surveyed.

Residential Demand

Of all respondents, 14 percent would consider relocating downtown on their next move (generally within the next five years), and an additional 30 percent would consider a downtown location at some point in the future. The time range at which this group envisions such a move is split between those anticipating relocation in the next five years, and those with moves 5-10 years in the future. The potential customer base for downtown residences skews both older and younger than the average downtown worker, with correspondingly lower household income and rent thresholds. As with current downtown residents, these individuals also tend to be newer to the area than those not interested in downtown. Considering only those individuals that do not currently live in or near (walk or short drive from) downtown, 56 percent would definitely not consider a downtown residence in the future regardless of the type of housing offered.

Of those potentially interested in downtown living, a majority still prefer single family homes (51%), although there is also interest in condominiums (15%) and renovated lofts (13%) which are felt to be not currently available downtown. Three bedroom/two bath units with garage or on site parking and storage area that are pet friendly and with/near green space are the most desirable. The largest share of those interested in additional housing options in the future would be willing to pay \$600-\$799 for desired units. However, 13 percent would be willing to spend more than \$1,200 per month on their ideal home.

Potential future downtown residents are most concerned with elements such as cost (i.e. seniors on fixed income), availability/quality of green space, and a concern over the nighttime atmosphere downtown. There is also concern among those interested in purchasing near downtown about the stability of property values as a good investment. Positive aspects of downtown living cited as the most compelling reasons for choosing downtown include proximity to stores, restaurants and festivals (multiple events mentioned as positive factors), as well as the appeal of being walking distance to work.

Business Survey

The 59 businesses responding to the online and in person surveys represent a wide variety of industries, as indicated in the chart at right. The average tenure of businesses surveyed was 19 years, although one quarter of businesses have been open for five years or less. Six have been open in downtown for 50 or more years. In total, the businesses surveyed employ 162 full time, 203 part time and 22 seasonal workers.

Business Operations

By and large, businesses indicate that economic activity has been stable over the past three years. With regard to employment;

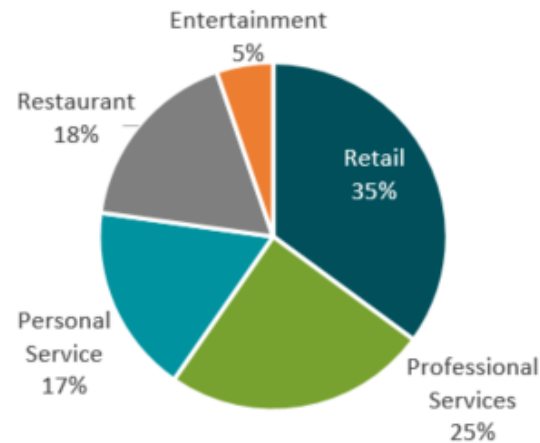
- 81 percent report no change in full time employment,
- 8.5 percent have reduced employee counts, and
- 11 percent hired additional employees.

Similar trends are indicated with regard to part time employees, although slightly more hiring has occurred within this sector, as 28 percent of businesses have added part time workers in the past three years. Revenue trends are more mixed, with one quarter of businesses reporting a decline in revenues in recent years, one quarter have remained stable, and half of businesses have grown sales over the past three years. These results are similar across sectors, although more professional service firms report increased revenues, and personal service firms have seen less stability, with half experiencing growth and half indicating declining performance.

One indicator of business performance is the expansion or contraction of operating hours. Of the businesses surveyed, just under two thirds (63%) have regular evening hours (after 6pm). This includes three-quarters of restaurants, but only 37 percent of other business categories. A slightly larger percentage (72%) offer weekend hours, primarily Saturday mornings. Currently, only 12 businesses are open on Sunday, including 58 percent of restaurants and only 15 percent of retailers.

The slowest reported sales period for businesses was Tuesday and Wednesday, especially during the months of January, February, July and August. Fridays were far and away the busiest sales days for all types of businesses, with Saturdays coming in second. Obviously, seasonality in business is cyclical and varies by industry – restaurants reported being busiest during January, February, July, August and November, while retailers were busiest in December, November and June. Personal service businesses peaked in March and the summer months, while professional services (aside from accounting) were busiest in early fall. By time of day, businesses were split between morning and evening peak periods. Personal service businesses drove activity in the morning hours, and restaurants and professional service firms see more traffic in evening and afternoon respectively. Only four businesses reported a lunchtime peak.

Chart 3.8: Survey Respondents by Type of Business



Source: Business Survey

Table 1.4: Seasonality by Industry

	Peak Season	Slow Season
Restaurants	Jan/Feb & Jul/Aug	May/June
Shops	Nov/Dec,	Feb/Mar
Personal Services	March, Summer	Early Fall
Professional Services	Early Fall	Dec/Jan

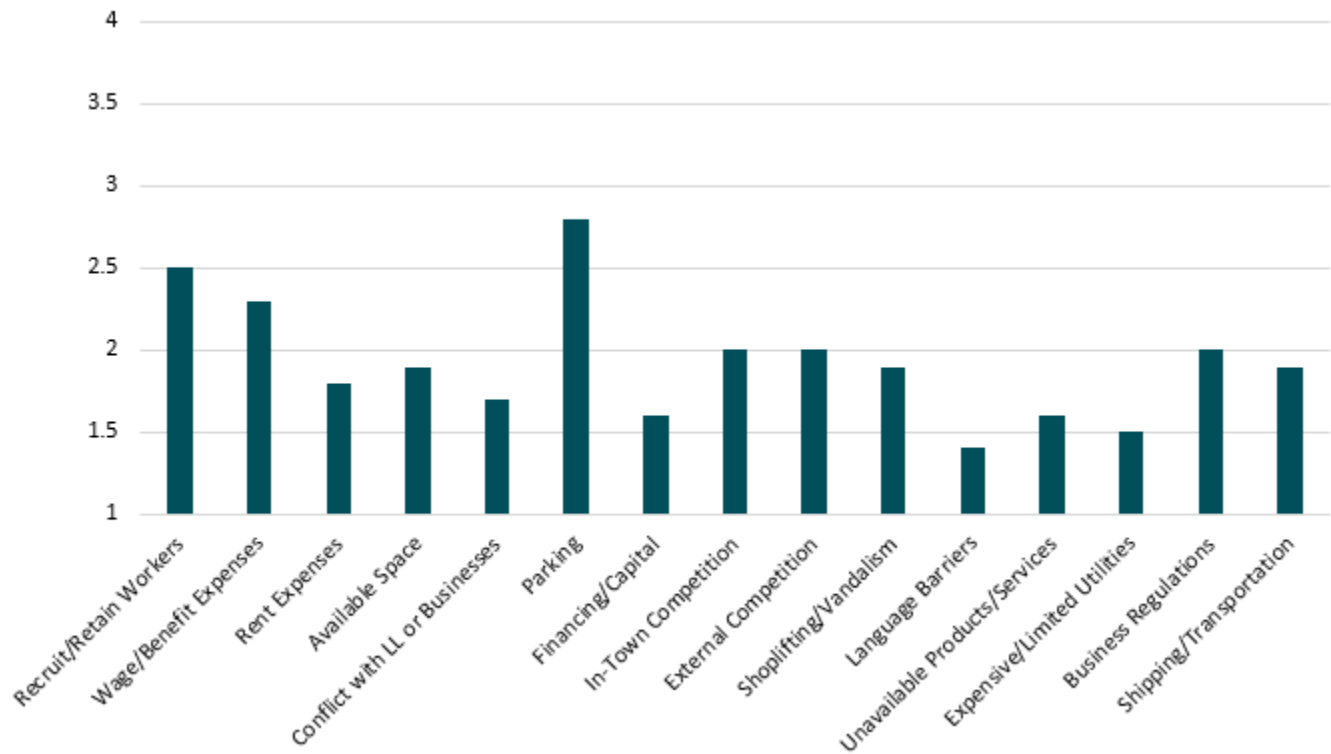
Source: Business Survey

Another telling factor is the attitude of businesses about the overall business climate and their individual business achievements. Surveyors asked business owners what they were most proud of with regard to their business. The largest share (44%) indicated that their longevity and/or ability to withstand the recession was the greatest accomplishment of the business. The second most common response, mentioned by 28 percent of businesses was the financial success and business growth that they have achieved. Other points of pride include the ability to provide quality products/services (24%), improvements to their space/property (12%), and their positive reputation in the community (8%).

Business Climate

Respondents indicated their degree of satisfaction with various local services, including public and private service providers. All services were rated as satisfactory, with fire protection receiving the highest score. Waste management services received the lowest score, but were still seen as satisfactory overall. Businesses were also asked to indicate the degree to which particular situations or services present any sort of challenge to their business operations. These responses are indicated in the chart below, where 1 indicates the situation presents no challenge/is not experienced by the business and 4 indicates a significant challenge exists in this area. Parking was identified as a minor challenge, as was the ability to recruit and retain workers. Several other factors represented occasional or limited challenges, or only impacted a few businesses, such as business regulation (signage was the largest factor identified), competition, and wage and benefit expenses. Shoplifting and vandalism were also identified as a potential issue, but it was also noted by several businesses that these activities only occur infrequently and there was no consensus that a downtown location contributed specifically to these activities.

Chart 3.9: Business Challenges



Source: Business Survey

Looking to the future, a number of businesses anticipate changes to their business in the next five years.

- Nearly half anticipate adding staff and/or operating hours,
- One-third anticipate expanding products, offerings and potentially square footage, and
- 14 percent anticipate expansion occurring outside downtown.

A few businesses also plan to reduce operations, with 9 percent planning staff reduction, 5 percent planning to reduce size or offerings, and 9 percent planning to close or transition the business during this period.

An additional 9 percent planning to move the business to a new location within this timeframe, meaning that the ability to retain them within downtown will depend upon the availability of suitable real estate at the time of the move. An additional 4 businesses that currently lease hope to purchase property in downtown in the future. Retention of these businesses will also rely on the availability and cost of suitable properties. A number of businesses currently leasing space do not have long-term leases in place, with only two businesses identifying lease expirations two or more years in the future. The presence of a number of businesses that are potentially mobile suggests a need to regularly communicate information on spaces available for sale or lease within downtown to the local business community in order to ensure that businesses that wish to grow, purchase or otherwise remain downtown are able to do so.

Only 26 percent do not anticipate any changes in business operations during this period. Of those businesses that are also building owners, roughly half anticipate making substantial investments in building improvements during this period.

Advantages & Disadvantages

Businesses appreciate the visibility, community sensibility, vehicular and pedestrian traffic and walkability and central location of a downtown location. The presence of adjacent businesses, prevalence of locally-owned businesses and ability to partnership with other shops is also appreciated, as evident in the word cloud below.

Chart 3.10: Downtown Location Advantages



Source: Business Survey

When asked about other downtown attractions which contribute to their business, businesses selected a number of beneficial partnerships. For instance, 47 percent of businesses feel that Fondue Fest boosts sales, while 29 percent feel that the Retlaw Hotel (when open) drew customers to their business. One-third of businesses felt that the Saturday Farmers Market benefitted business, 28 percent experienced gains from Shop Small Saturday, 26 percent from City/County building visitors, 23 percent attract patrons from the YMCA and 21 percent from the Christmas Parade. Fewer than 20 percent shared customers with Fruth Field, the Library, THELMA, or the Wednesday Farmers Market.

Although downtown's central location was cited as a key advantage for many businesses, a majority of customers (67%) still travel from Fond du Lac and the surrounding towns. Between 7-10 percent of customers travel from other nearby areas such as Oshkosh, Waupun, and the Holyland, while few customers travel from communities to the west. Just under 20 percent of customers are regional or out of state travelers, largely representing visitor traffic. Similarly, one-third of businesses supplement local revenues with online sales.

While a wide variety of advantages were listed to a downtown location, only one disadvantage was mentioned with any frequency, which was parking, named as a challenge by 42 percent of businesses interviewed. Although this is a high percentage, it should also be noted that several businesses indicated that the perception of parking is worse than the reality, and half of respondents mentioning parking also mentioned other concerns as equally important. The only other common themes identified as a challenge were awareness and cleanliness, with various issues such as litter, garbage collection, dog poop and graffiti cited as contributing to poor business atmosphere, and multiple businesses indicating that an overall lack of awareness and/or negative perception of downtown limits the potential customer base.

Businesses were asked to identify any assistances or services which would be helpful to their business. Although most businesses did not feel they needed particular assistance, categories which were identified as having the some potential value were (in order of perceived value):

- Building Improvement Assistance
- Business Transition/Expansion Planning
- Business Market Analysis
- Window Display & Merchandising
- Business Strategic Planning
- Financial management, Employee Hiring/Training, E-Commerce (tie)

Similarly, businesses were also asked to identify complementary businesses, which, if located downtown, would draw additional customers within their core demographic. Businesses identified as priority recruitment targets (new to downtown and/or a desire for more of this type of business) included:

- Retail shops: need for greater clustering, desire for clothing, candy/popcorn and quality food
- Restaurants: Brew pubs or other nicer restaurants, coffee shops, healthy delis
- Hotel
- Entertainment: Performance venues, live music, quality bars
- Amenities/Services: ADA Accessibility, pedestrian friendly amenities, code enforcement
- Events: More retail-oriented, regularly occurring
- Personal Services: Salons, gyms

Change Over Time

Several of the questions asked as part of the business survey were also asked during a similar survey in 2005. Although some fundamental issues remain constant, in many instances, 2016 responses represent a substantial shift in the past decade. The following bullets summarize the similarities and changes reflected in these results.

- Desire for additional restaurants and clothing/shoes remain strong.

- Desired business types in 2005 were overwhelmingly national chains. In 2016, the vast majority of desirable co-tenants were other local businesses.
- Difficulty recruiting/retaining workers, lack of suitable/available space and restrictive business regulations pose a problem for more businesses in 2016 than 2005, while utility costs, employee wages, local competition and shoplifting/vandalism are of reduced concern today.
- Businesses are more interested in/open to assistance/support with all manner of business concerns today than in 2005. While the top three areas where assistance is deemed most valuable remain the same (marketing, building improvements and window displays), business transition planning has risen from the second lowest priority to fourth, with 18 percent of businesses indicating that this assistance would be valuable.



Implementation Strategies

Key Opportunities and Challenges

It is important to understand the downtown market in terms of the perceptions of its users. While market information can indicate areas where downtown may be performing exceptionally well or poorly, this performance may be due to a wide variety of factors, both real and perceived. Combining market analysis with qualitative information from surveys of constituent groups can help identify areas where market opportunities align closely with customer preferences, presenting opportunities for near-term action. Additionally, while some aspects of market performance may be the result of local policies or infrastructure, other challenges are driven by regional or national trends and unlikely to be substantially impacted at the local level. Table 4.0 illustrates some of the core opportunities and challenges identified in the analysis and survey which are the basis for implementation strategies presented in this chapter. Note that some trends represent both near-term challenges as well as longer term opportunities.

Table 4.0 Downtown Fond du Lac Opportunities & Challenges

Sector	Opportunity	Challenge
Residential	<ul style="list-style-type: none">• Empty Nester Demand• Investment in Near Term Neighborhoods• Positive Perception of Downtown	<ul style="list-style-type: none">• Perception of Nighttime Safety• Lack of For-Sale Options
Retail & Service	<ul style="list-style-type: none">• Lack of Hospitality/Hotel• Large Number of Growing Businesses• Strong Arts & Culture Cluster	<ul style="list-style-type: none">• Geographic Distribution of Retailers• Need to Accommodate Expansions
Commercial & Office	<ul style="list-style-type: none">• Growth of Marian University Presence• Employment Growth Sectors Align with Downtown Industries	<ul style="list-style-type: none">• Limited Workforce Spending• Limited Quick-Serve Lunch Options
Built Environment	<ul style="list-style-type: none">• Potential to Connect to River• Use of Lighting to Create Nighttime Activity/Ambiance	<ul style="list-style-type: none">• Limited Gathering Space in Center of Corridor• Mismatch Between Available Space and Prospective Business Needs

Goals & Implementation Strategies

The implementation matrix beginning on page 44 provides a detailed breakdown of goals into objectives and initiatives designed to make measurable impact in the identified opportunity areas. The matrix utilizes the Main Street Four Point Approach to organize these objectives, which also corresponds to the committee structure currently in place at the Downtown Fond du Lac Partnership. Although these four points provide the structure for the overall plan, the initiatives are designed to work in tandem to create sustainable change in downtown economics and attitudes, and efforts in one area should inform other efforts.

It should be noted that many, if not all, of the initiatives identified will require participation of multiple local stakeholders working in tandem to achieve success. Additionally, each initiative will require a local champion or lead entity which will be responsible for moving the project forward. Suggestions for measuring and tracking outcomes of the various initiatives are provided later in this chapter.

The following section provides more detail and background on many of the recommended initiatives, including case studies of successful initiatives in other communities.

Economic Vitality

Major objectives within the area of economic vitality include real estate and business climate initiatives. Although downtown storefronts are relatively full, with only a 7 percent vacancy rate, there are some stubborn vacancies and also certain types of spaces which are lacking. In addition, the presence of several large available or underutilized properties creates an opportunity for targeted reuse. Successfully tackling this type of large scale project requires not only a clear vision for what type of uses are desired, supported and achievable within the downtown, but will also require buy-in from local investors to gain control of the properties and/or help fund viable business ventures.

Case Study: Crowdfunding has been used to successfully achieve community objectives in a number of instances including the following:

- In Beloit, local investors purchased individual hotel rooms as condominiums to raise capital for development of a downtown hotel which was identified by local businesses as a key missing asset for courting clients and potential employees. Ten years later, the operators of the Ironworks Hotel re-purchased the units from investors and continue to operate the hotel.
- In Red Wing, Minnesota, the lack of a full service restaurant resulted in a noted lack of tourist spending, despite numerous successful events and plentiful shops. A local property owner and investor group provided funds for a grant and loan package available for a restaurant that would sign a multi-year commitment and demonstrate a sustainable business plan. The group was successful in attracting five applicants, two of which ended up opening.

In addition to recruiting commercial tenants, full real estate utilization will require a sustained effort to promote additional residential options in the core of downtown as well as center city neighborhoods. Marketing existing programs and success stories, while continuing to court developers of alternate product types.



The Ironworks Hotel is an example of a crowd-funded business development project, while Red Wing's Restaurant Challenge successfully addressed that community's lack of dining options.

Existing businesses also present opportunities for economic expansion. Creating a strong and growing destination retail district will require:

- Assistance to existing businesses hoping to grow and expand within downtown, whether through targeted technical training, funding assistance or programs designed to capture additional spending from underserved markets.
- Family-friendly amenities were desired by many survey respondents. Since this demographic group is a critical component of the local market, introducing more family-friendly elements (within the public realm and private businesses) fosters additional traffic from families already coming downtown for destinations such as the library and events such as the farmers market.
- Support for entrepreneurs and existing growing businesses through technical training as well as business to business assistance programs and targeted incentives for desired businesses and/or renovation of critical properties.
- Targeted marketing and programming highlighting unique business clusters and 'districts' within downtown, along with support for cross-promotional activities.

Case Study: A growing number of downtowns are employing the use of 'districts' to facilitate targeted business recruitment and support the growth of unique businesses which benefit from proximity to co-tenants with similar customer demographics. Arts districts and entertainment districts are the most common, although any type of naturally occurring business cluster can drive a district designation.

- The Paducah, KY Arts District was created to help support an existing artistic community. To foster growth in the sector, zoning codes were changed to allow more live/work and performance/restaurant storefront spaces and accommodate the need for alternate infrastructure such as kilns. Additionally, a fund was created through a local bank to provide an incentive to relocating artists based on guaranteed tenure. Additional public sector initiatives installed additional public art and programming to complement these businesses.

Visual Appeal

Although downtown is already seen as very pedestrian friendly, the perception is that it is lacking in color and greenery, and that the nighttime environment is less appealing than the daytime experience. Since many studies have shown that a more attractive environment is conducive to longer visits and more spending, increasing the overall visual appeal is beneficial for downtown businesses. Similarly, increasing the number of people in an area will make it a more attractive place, creating a positive cycle. Some key areas of focus for increasing visual appeal include:



Boulder's Pearl Street Mall offers natural play areas within the public realm, enabling families to take a break from shopping and linger longer downtown.

Examples of art district signage and streetscape amenities which reinforce district marketing as a unique and creative destination.

- Improving the ambiance of the current environment through greening and other aesthetic strategies. Continuing the initiative to install greenery and streetscape elements around parking lots and along other common paths is a great start. The addition of other street trees or planters along trafficked corridors, and introduction of public art such as murals or sculptures in other right of ways can add visual interest and encourage customers to walk further during a typical downtown visit.
- Improving the nighttime environment by adding lighting in critical areas including parking lots, pedestrian corridors and central gathering areas increases pedestrian comfort and creates an inviting evening environment, which in turn supports dining, arts and other evening entertainment while also reducing the presence of less-desirable activities.



Marketing Image

There are many groups that are active supporters and patrons of downtown businesses and events. Finding ways to leverage these activities and make them visible helps increase awareness among the general population about downtown advantages and assets.

- Enabling or providing infrastructure that encourages public gathering such as patio cafes, flexible public spaces and/or temporary furniture or amenities generates outdoor activity which in turn attracts additional foot traffic. Similarly, increasing access to and interaction with the river creates opportunities to capitalize on a unique asset, and one that is already an often-photographed spot within the community.
- Visitors to the community are already sharing their experience with the world via social media and other networks. Leveraging this traffic through the use of tools such as Snapchat Geofilters and iconic photo stops can help convey the local brand while enlisting existing visitors as marketing ambassadors.
- Reinforcing and building on existing clusters and destinations by creating unique sample itineraries designed to encourage key demographics. Examples might include an 'active afternoon' featuring a bike tour on The Loop with rental bikes from a downtown shop, a historic walking tour of downtown, and a healthy dinner at a downtown restaurant, or an 'arts and culture outing' incorporating a visit to local galleries, an arts performance and pre-show dinner.



Greening parking lots and adding patio cafes can increase pedestrian and visitor comfort.

Interactive amenities leverage existing visitor traffic to spread the message and brand of Fond du Lac.

Strategic lighting and evening programming create a sense of safety and activity during off-peak hours.

Community Engagement

As efforts are successful to diversify the residential, business and visitor mix downtown, it will be critical to engage these new audiences to help support and leverage new audiences. This can be accomplished in a number of ways, such as:

- Residential outreach to engage and inform downtown and center city residents about the DFP, downtown enhancements and upcoming initiatives. Initially, this may be accomplished through outreach to landlords and neighborhood associations, although ultimately a downtown residents group may be desirable. These stakeholders can provide valuable assistance in clean & safe initiatives by reporting issues in a timely fashion, and are also a key market for new business launches, downtown events, and for current and future residential improvement funds/projects.
- Emerging stakeholder outreach also includes strategies to increase the number of voices speaking positively about downtown. Recruiting guest bloggers or social media liaisons with a variety of points of view (i.e. residents, artists, young professionals, empty nesters) and encouraging them to share unique observations and perspectives on downtown can help attract others of their demographic to the area. Additionally, these liaisons provide a potential focus group for marketing and other initiatives.

Timeline & Costs

This plan is designed to provide a forward-looking framework for the next five years of downtown revitalization initiatives. Because this analysis is market-based, it is likely that many of the economic and demographic factors surrounding this plan will have shifted over this period, and it is advisable to update and revise organizational goals to reflect these realities.

Initiatives are identified in the plan as either suitable for near term, mid term or long term action. These timelines are relative, and identify initiatives that can be undertaken easily and without significant allocation of funds as appropriate for the near term, those which will require funding, staffing and/or stakeholder engagement to complete as suitable for mid term implementation, and those that require progress on prior initiatives, a change in local conditions, or substantial actions by other parties as suitable for long term action. In a general sense, near term initiatives can be thought of as those suitable for action in the next year, mid term actions as those in the next 2-3 years and long term actions as those likely to take 4-5 years to be completed. However, not all near term initiatives will be undertaken simultaneously, and a delay in near term initiatives in some areas will necessarily delay the completion of later stage actions.

It is important to note that this plan includes a broad range of activities and its successful implementation will require engagement from a broad sector of local partners. Costs for implementing aspects of the plan range from no or low-cost to tens or hundreds of thousands of dollars, although many aspects are scalable and/or eligible for funding assistance through various grant or loan programs, while others offer the potential of future revenues or returns. Although suggested timeframes are indicated for each item based on a combination of market conditions, financial constraints and amount of foundation-building required, the timing of individual initiatives will depend on a variety of factors. Similarly, grant cycles and other financial deadlines may also adjust the start times for individual initiatives, but are unlikely to impact the relative timing of events within a given strategic focus.

As an example, at its July 2016 board meeting, the board identified three near-term priorities, including continued improvements to physical infrastructure, the establishment of a destination district, establishment of an amenity, and expanded regional marketing as their top three priorities for the future. The City will similarly identify priorities within its capital planning budget. Both of these activities may serve to accelerate or delay the launch of specific initiatives, provided that favorable market conditions are present. It is also important to remember that while some initiatives may require substantial action or capital in a given year, this does not preclude local partners from beginning preliminary discussions or planning for future activities behind the scenes.

Implementation Plan

The following pages include a detailed implementation plan, including goals, objectives, action items, timing and anticipated costs, grouped according to the four focus areas, and ordered according to anticipated order of implementation. This plan is designed to be a living document, able to accommodate additional projects or new initiatives which may arise while retaining a framework for prioritizing investment and activities.

	Goals	Objectives	Ref. #	Action Items	Timing			Budget
Improve Economic Vitality	Maximize Real Estate Utilization	Redevelop priority/opportunity properties.	1.1	Identify list of key uses missing in/desired for downtown and necessary parameters for each.	Near Term			\$
			1.2	Create local investor group to gain control of key properties and support renovation.		Mid Term		\$
			1.3	Host focus group for key properties including investors, business leaders, civic and economic development partners.		Mid Term		\$
			1.4	Match key properties with potential opportunities and develop action plan and solicit partners for each.	Near-Mid Term			\$\$
		Promote diverse residential offerings.	1.5	Assist in the process to develop a variety of residential types in downtown, including for-sale options for empty nesters.	Near Term			\$\$\$
			1.6	Help to promote center city neighborhoods as quality destinations.	Ongoing			\$
	Strengthen Retail & Restaurant Environment	Retain, grow and recruit quality businesses.		Hold retention visits with key businesses annually.	Ongoing			\$
			1.8	Identify businesses with expansion plans in next 5-years and establish space parameters, look to match businesses with current/potential spaces.	Near Term			\$\$\$
			1.9	Identify businesses with near-term succession/transition needs. Facilitate referrals to business coaches to help transition businesses successfully.	Near Term			\$
			1.10	Further Investment in the Arts & Entertainment District		Mid Term		\$\$\$
		Encourage clustering of comparable businesses/uses.	1.11	Explore strategies for creating additional informal mini-districts (shopping, entertainment) which can be reinforced by streetscape elements and programming.		Mid Term		\$
			1.12	Encourage businesses to locate near comparable businesses - create targeted recruitment campaign for key available properties.			Long Term	\$\$
		Increase capture of family activities & spending.	1.13	Encourage businesses to introduce family-friendly amenities/items (i.e. restrooms, play areas, menu items, parking stalls)	Near Term			\$
			1.14	Promote family itineraries downtown online, to bloggers, etc.	Near Term			\$\$
			1.15	Introduce child-friendly streetscape items (hidden objects, sidewalk hopscotch, natural play in pocket parks)	Near-Mid Term			\$\$
		Increase capture of worker spending.	1.16	Continue to promote pickup/delivery lunch options.	Ongoing			\$
			1.17	Explore strategies for targeted worker promotions - worker appreciation day, lunch cash mobs, employee health initiatives, etc.	Near Term			\$\$
			1.18	Recruit additional restaurant options for lunch and dinner - conduct restaurant demand profile study to refine need.	Near Term			\$
		Increase capture of visitor spending.	1.19	Continue to promote wedding cluster, including hotel.	Ongoing			\$
			1.20	Support renovation of downtown hotel.	Near Term			\$\$\$
			1.21	Promote multi-hour itineraries surrounding downtown/community events to prolong visits/increase trade area.		Mid Term		\$\$
			1.22	Recruit high-end entertainment/drinking establishment.		Mid Term		\$\$
		Provide business support services/network.	1.23	Continue business marketing group.	Ongoing			\$
			1.24	Create team of business services professionals to meet with prospective new businesses to downtown to increase retention. (and increase B2B spending).	Near Term			\$

	Goals	Objectives	Ref. #	Action Items	Timing		Budget
Increase Visual Appeal	Enhance Appearance of Built Environment	Reduce/eliminate appearance of blight.	2.1	Work with property owners/businesses to monitor and enforce municipal ordinances and health safety violations.	Ongoing		\$
			2.2	Continue to offer building improvement programs (façade, upper floor, etc). Explore additional focus areas such as alleys, parking lots, etc.	Near Term		\$\$\$
			2.3	Create an investor group to acquire and renovate dated properties which become available.	Mid-Long Term		\$
		Create active night time environment.	2.4	Conduct walking tours with key stakeholders during evening hours to identify problem locations (or hospitality study)	Near Term		\$\$
			2.5	Encourage property owners to light storefronts.	Near Term		\$\$\$
			2.6	Install streetscape lighting in strategic locations to improve visibility.	Near-Mid Term		\$\$\$
			2.7	Introduce strategic programming to increase nighttime foot traffic.	Mid Term		\$\$
			2.8	Recruit businesses catering to wider demographics and responding to market needs during evening hours.		Long Term	\$
	Expand Natural Elements	Increase visibility of and access to Fond du Lac River.	2.9	Improve streetscape connections on East-West streets to the River to encourage pedestrian connections.	Near-Mid Term		\$\$\$
			2.10	Incorporate Hamilton Park and The Loop into existing or new events (duck race, adventure race, etc.)		Mid Term	\$
			2.11	Support development of restaurant with riverfront dining/views.		Long Term	\$
		Increase amount of color and vegetation in downtown.	2.12	Continue project to enhance and 'green' parking lots around downtown.	Near Term		\$\$\$
			2.13	Promote & incorporate public art (permanent and temporary) in and around downtown.	Ongoing		\$\$
Enhance Marketing Image	Increase Sense of Activity/Energy Downtown.	Increase overall sense of activity in downtown.	3.1	Encourage introduction of patio seating and/or parklets to introduce additional outdoor activity.	Near Term		\$
			3.2	Promote/encourage outdoor programming/activity by providing access to locations and/or amenities. for existing groups to host outdoor gatherings (i.e. yoga in the park, bingo in the park, kite flying, etc.)		Mid Term	\$
			3.3	Invest in temporary outdoor amenities that can be utilized during key periods (yard games, moveable seating, etc.)		Mid Term	\$\$
	Leverage Existing Visitor Experiences	Create iconic imagery that maximizes visitor traffic/marketing.	3.4	Create snapchat geofilter to tag images captured in DT FDL.	Near Term		\$
			3.5	Establish/create branded photo opportunities to increase social media activity (currently St. Pauls Cathedral-weddings)		Mid Term	\$\$
		Pursue creation/marketing of a destination district/establishment/amenity that sets downtown Fond du Lac apart.	3.6	Work to co-brand existing businesses and attractions with comparable clientele.		Mid Term	\$
			3.7	Create targeted itineraries for targeted audiences to create half-day, one-day and two-day experiences. Engage marketing partners, bloggers, etc. to increase regional awareness.		Mid Term	\$
			3.8	Recruit complementary businesses/uses which leverage key brands (i.e. Local Foods, Public Market, Arts/Culture, Family Friendly)		Long Term	\$

	Goals	Objectives	Ref. #	Action Items	Timing			Budget
Heighten Community Engagement	Leverage Growing Residential Base	Communicate effectively with downtown residents.	4.1	Continue/expand outreach to existing center city neighborhood groups.	Near Term			\$
			4.2	Support formation of downtown resident and/or landlord group.		Mid Term		\$
			4.3	Help coordinate and attend resident group meetings, encourage participation by police, City, etc.		Mid Term		\$
			4.4	Encourage coordination between businesses and resident groups to create regular retail events (i.e. rotating resident happy hour, resident appreciation days/open house, etc.)			Long Term	\$
	Reach & Engage Key/Emerging Stakeholders	Develop targeted communications channels.	4.5	Recruit guest bloggers/posters representing key demographics (young professionals, artists) to provide perspective on downtown amenities.	Near Term			\$\$
		Establish liaison positions.	4.6	Identify liaisons between DFP and formal or informal groups invested in downtown (seniors, artists, stay at home moms, etc).		Mid Term		\$
		Target strategic volunteer needs.	4.7	Identify non-event volunteer tasks and develop position descriptions (photographer, guest shopper, graffiti reporter, etc)	Near-Mid Term			\$

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Budget Key:

\$ = Minimal Additional Cost Outside of Operational Overhead

\$\$ = Low-Cost Projects, Prioritized in Annual Budget or Existing Funding Streams

\$\$\$ = Capital Investment, Would Require Funding Source/Strategy

Recommendation 1.4 – Targeted Redevelopment of Priority/Opportunity Properties

Strategy: Improve the Economic Vitality of Downtown

Goal: Maximize Real Estate Utilization

Details: Identify key properties based on potential economic impact to surrounding properties and downtown as a whole. Determine viable uses, or uses that support the demand identified in the market analysis. Determine estimated acquisition and renovation costs, along with potential financial incentive programs. Identify potential developers through a RFP process, and work with the developer during the implementation process.

Timing: Near term

Cost: \$

Benefits: The 'blanketed' approach to redeveloping ALL downtown properties dilutes effort. Survey results show a perceived lack of action toward nuisance properties/businesses/individuals. A strategic redevelopment plan for specific properties will focus efforts and be able to clearly identify the success of each project. By selecting the right properties for redevelopment, a domino effect will be created. *A rising tide lifts all boats.*



Example 1: Public Market

Recommendation 1.5 – Support New Residential Development

Strategy: Improve the Economic Vitality of Downtown

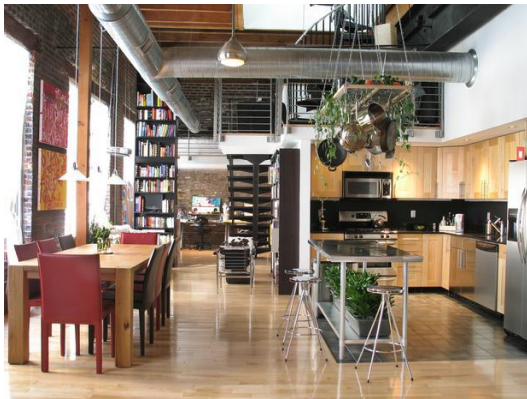
Goal: Maximize Real Estate Utilization

Details: Assist in the process of developing all residential types in the downtown including financial incentives. This would include feasibility studies of developing upper floor living quarters.

Timing: Near term

Cost: \$\$\$

Benefits: Additional downtown residents provide a built in customer base for downtown businesses. Residents create an overall sense of vibrancy, energy and walkability. Empty nesters/retirees are a group with strong interest in future downtown living. This audience prefers condominium/townhome options over apartments, and values privacy/separate entrances and access to green space. Pet friendly spaces are also highly desirable. A study published by the Wisconsin Economic Development Corporation in 2014 identified a current demand of 69 residential units with a demand of 112 units expected by 2020. Although only 9 percent of workforce survey respondents were interested in residential options in the near term, 44 percent would potentially be interested at some point in the future.



Example 2: Industrial Style/Loft Apartment



Example 3: Rooftop Patio

Recommendation 1.8 – Implement a Business Expansion Incentive Program

Strategy: Improve the Economic Vitality of Downtown

Goal: Strengthen the Retail and Restaurant Environment

Details: Identify existing businesses that are positioned to add additional locations.

Timing: Near term

Cost: \$\$\$

Benefits: This incentive would encourage successful existing businesses to expand and to highly consider downtown Fond du Lac. In survey results, when asked to identify specific priorities for improving the look and feel of downtown, the clear choices were more improved restaurants and more and improved shopping. Specific opportunity exists to add retail shops such as clothing, specialty, hobby and general merchandise, dining options including fine dining, healthy options, quick serve, outdoor dining and coffee shops and entertainment destinations featuring music, family friendly activities, movies and the arts and high end drinking places.



Recommendation 1.10 – Further Investment in the Arts & Entertainment District

Strategy: Improve the Economic Vitality of Downtown

Goal: Strengthen Retail and Restaurant Environment

Details: With the recent addition of Thelma Sadoff Center for the Arts and the current redevelopment of the Retlaw Hotel, there is strong momentum to continue additional development. This includes: recruiting additional A&E related businesses, developing and programming both indoor and outdoor A&E related activities. Adding identifying banners, signs and streetscape amenities. Signage might include pedestrian friendly maps and an interactive screen highlighting local events. Enhance the streetscape with outdoor art, interactive art, sculptures, murals and creative surface treatments (sidewalks, roadways, crosswalks).

Timing: Mid term

Cost: \$\$\$

Benefits: A strong centralized destination would serve as an entertainment hub for visitors and residents. Upscale bars and/or other nightlife and entertainment destinations are in high demand.

- Wine/painting studios, brew-pubs, taprooms and music venues were all specifically mentioned as desirable additions to downtown.
- For both restaurants and nightlife, outdoor seating was identified as a highly desirable amenity. This is in keeping with the 2/3 of national franchises which require outdoor seating options in site selection criteria today.
- Family friendly entertainment and dining was also mentioned frequently. As the library was cited as one of the top destinations for both workers and residents, there is a natural crossover between family-friendly restaurants and destinations. Many suggested business types (coffee shops, painting studios) can cater to both audiences depending on the time of day.

Events, arts and culture, the library and service businesses are by far the most positive aspects of downtown for all respondents. Connecting and building off of these success stories to promote additional rehabilitation/development, business activity and smaller scale recurring events is an opportunity.

Arts and culture activities are the number one destination activity downtown, and the only category where more people travel to downtown than elsewhere for an activity. Opportunities exist to create additional business/marketing partnerships connecting arts and cultural activities with shopping and dining (or overnight stays when available).



Example 4: Arts District Signage



Example 5: High End Leasable Street Furniture



Example 6: Public Art



Example 7: Evening Street Dance



Example 8: Successful Outdoor Concert at THELMA

Recommendation 2.2 – Building Improvement Incentive Programs

Strategy: Increase Visual Appeal

Goal: Enhance Appearance of Built Environment

Action Items: Continue to offer building improvement incentives.

Timing: Near term

Cost: \$\$\$

Benefits: Encourages and promotes private investment. Survey results show that 38% of respondents do not believe that downtown has attractive storefronts. Also 54% feel that downtown does not present a positive image to visitors. Past results have shown that for every dollar of public investment, there has been a private investment of \$11.



Example 9: Assistance with Identifying Design Enhancement Opportunities



Example 10: Facade Development of Upper Levels

Recommendation 2.3 – Lighting Improvements

Strategy: Increase Visual Appeal

Goal: Enhance Appearance of Built Environment

Objective: Create an active night time environment

Action Items: Design a lighting plan and install streetscape lighting in strategic locations to improve visibility. Host a nighttime walk to understand and experience downtown Fond du Lac in the evening. Identify particular areas of concern with regard to lighting, loitering and other safety or image concerns. Review Milwaukee's nighttime economy initiative for inspiration.

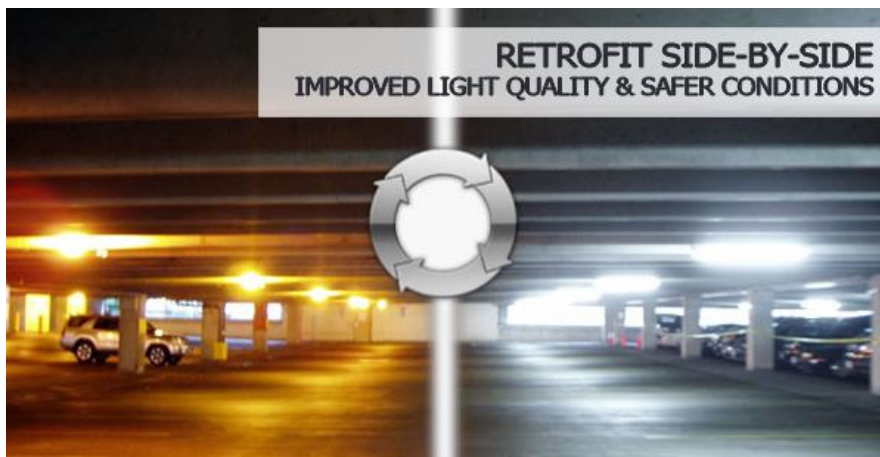
Timing: Near term planning, mid-term implementation

Cost: \$\$\$

Benefits: The nighttime atmosphere of downtown was cited as the major concern by both current residents and those contemplating a move to downtown. Concerns included loitering, littering and establishments attracting undesirable individuals. A well-lit environment will improve the sense of safety and walkability in the downtown district. This will encourage users to utilize offset parking lots and increase night time vibrancy, especially in winter when it becomes dark before the dinner hour.



Example 11: Low-level Pedestrian Street Lighting



Example 12: Safer Parking Lighting

Recommendation 2.10 – Increase the Beautification, Utilization, Visibility and Access to Hamilton Park

Strategy: Increase Visual Appeal

Goal: Expand Natural Elements

Objective: Improve streetscape connections to Hamilton Park and the Loop.

Action Items: Create a usage plan to better utilize Hamilton Park and the Loop.

Timing: Mid term

Cost: \$\$\$

Benefits: Survey results show a strong desire for outdoor space and amenities. There is significant opportunity to better utilize green space that is already in the downtown. Green space was identified as a priority amenity for current and prospective residents. Aesthetics, variety and quality of green/plaza/public spaces in downtown also contributed to one-fourth to one-third (depending on the audience) percent of respondents that identified a cleaner and more beautiful downtown as a top priority for the next five years.



Example 13: Water feature



Example 14: Interactive Park Amenities



Example 15: Spray Play



Example 14: Pedestrian Bridge



Example 15: Pedestrian Bridge

Recommendation 2.12 – Improved Landscaping and Streetscape Amenities

Strategy: Increase Visual Appeal

Goal: Expand Natural Elements

Objective: Increase amount of color and vegetation in downtown

Action Items: Increase the visual appeal of flowers and landscaping in the downtown streetscape

Timing: Near term

Cost: \$\$\$

Benefits: Sense of community pride and beauty. Green space was identified as a priority amenity for current and prospective residents. Aesthetics, variety and quality of green/plaza/public spaces in downtown also contributed to one-fourth to one-third (depending on the audience) percent of respondents that identified a cleaner and more beautiful downtown as a top priority for the next five years.



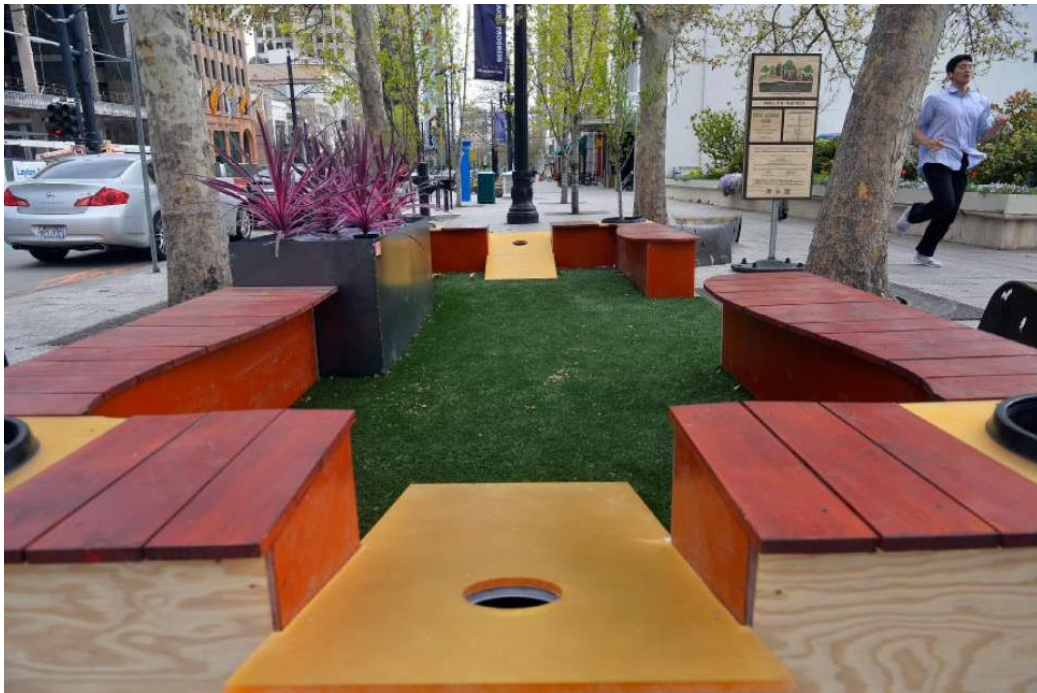
Example 16: Example of Landscaping



Example 17: Example of high impact florals



Example 18: Streetscape Amenities



Example 19: Interactive street furniture

Recommendation 2.13 – Public Art

Strategy: Increase Visual Appeal

Goal: Expand Natural Elements

Objective: Increase the amount of color and vegetation downtown

Action Items: Incorporate public art in the downtown. This might include sculptures, murals, surface improvements, and interactive art.

Timing: Near term

Cost: \$\$\$

Benefits: A more lively, creative and animated downtown district.



Example 20: Interactive sculpture



Example 21: Art sculpture/water feature



Example 22: Unique example of solar powered motion sensed art



Example 23: Mural



Example 26: Art on poles



Example 27: Art sculptures injected with colorful lighting

Recommendation 3.3 – Temporary Interactive Amenities

Strategy: Enhance Marketing Image

Goal: Increase Sense of Activity/Energy Downtown

Objective: Increase overall sense of activity in downtown

Action Items: Invest in outdoor amenities to increase outdoor activity. This might include life size chess boards, yards games, tables and chairs, etc.

Timing: Mid term

Cost: \$\$

Benefits: The sense of excitement and a more lively, creative and animated downtown district.



Example 24: Temporary parklets



Example 25: Interactive solar art



Example 26: Creatively designed street furniture



Example 27: Temporary interactive sculpture

Recommendation 3.5 – Photo Opportunities

Strategy: Enhance Marketing Image

Goal: Leverage Existing Visitor Experiences

Objective: Create iconic imagery that maximizes visitor traffic/marketing

Action Items: Establish/create branded photo opportunities to increase social media activity.
This might include interactive art.

Timing: Mid term

Cost: \$\$

Benefits: The sense of excitement and a more lively, creative and animated downtown district.



Example 28: Hanging lights above Main Street



Example 29: Sculpture used for photo ops



Example 30: Hanging sails add color and sense of place



Example 31: Hanging umbrellas add vibrancy and color



Example 32: Using your city name as a photo op



Example 33: Temporary surface art



Example 34: Hanging light create a sense of place and wonder



Example 35: Creative idea for a photo op spot