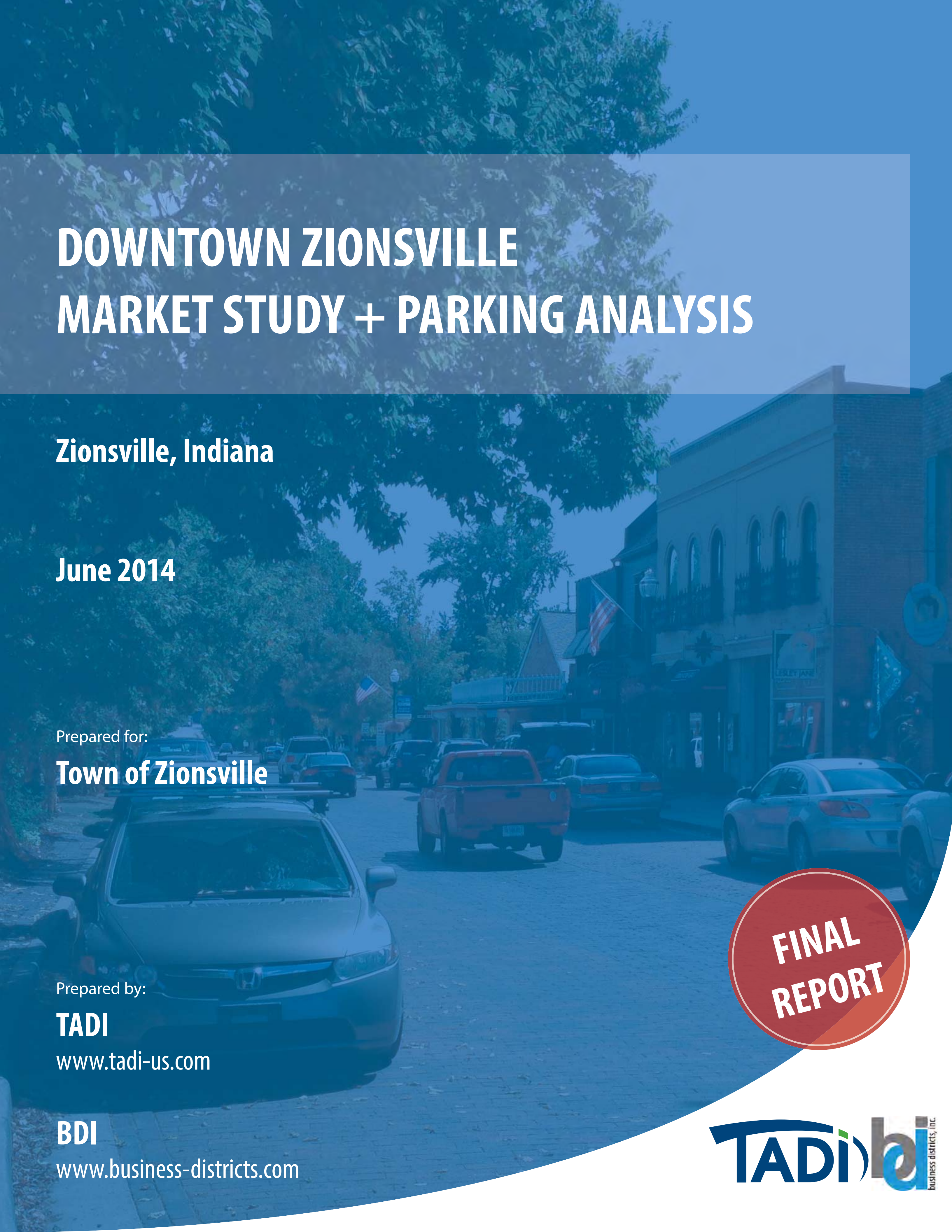

DOWNTOWN ZIONSVILLE MARKET STUDY + PARKING ANALYSIS

Zionsville, Indiana

June 2014

Prepared for:

Town of Zionsville

FINAL REPORT

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EXECUTIVE SUMMARY

Downtown Zionsville plays a major role in defining the Town's image and identity while also serving as the center of community activity. Residents and business owners are proud of Downtown's authenticity, historic character, and the pedestrian-scale of buildings along the bricks of Main Street and the surrounding area. While Downtown is successful today, conditions are constantly evolving and the Town recognizes the need to develop a strategy that helps guide future planning and economic development efforts to strengthen Downtown in the short-term and ensure it remains viable for years to come.

Considering the interrelationship between economic development strategies and parking conditions and how they collectively contribute to the success of a downtown district, it is important that both key elements be considered together throughout the study process. Thus, the study has collectively integrated both market and parking considerations in the identification of recommended strategies to support and strengthen Downtown in the coming years.

The following outlines general study conclusions for both the market and parking components of the study.

GENERAL CONCLUSIONS

Market Study

Zionsville's Downtown serves strong local and regional consumer and visitor markets. Residents identify with their Downtown and believe that it can become an even better central place for Zionsville. Downtown's businesses include well-known, independent retailers and restaurants—many are regional destinations. The existing building stock provides vintage space that appeals to prospective independent retailers and restaurateurs seeking a location 'on the bricks.' All of these market attributes represent ongoing competitive advantages for the study area and provide the basis for capitalizing on the multiple growth opportunities identified in this study.

To take advantage of the study area's inherent strengths, four (4) initial recommendations have been identified for implementation during the next two (2) years:

1. The Town and the Zionsville Chamber can begin to strategically market the downtown offering to regional consumers and potential tenants. Part of this initial work should be an assessment of the existing special events calendar and of all current marketing efforts to Zionsville's residents and downtown's broader trade area. The work of the five (5) peer communities described in this study present multiple examples of successful downtown marketing efforts. After this initial assessment, developing a comprehensive downtown marketing approach that attracts residents and visitors, supports business sales growth, and enhances downtown's image

2. Town officials and the Zionsville Chamber should share the results of this study's consumer survey with downtown's business and property owners and with the local commercial real estate community. These results can be applied in multiple ways--to downtown business operating hours, to business expansion plans and recruitment targets, and to enable property owners to recruit sustainable business tenants that complement and strengthen the study area's business mix. Recruitment and tenanting work will require ongoing outreach to property owners and target businesses, starting with sharing this new data. This outreach will represent an important component of this initial and ongoing implementation.

3. The Town, its downtown partner organizations, and Zionsville's residents have an important opportunity to affect downtown's continued success by collaborating on programs and activities that support downtown's economic future. This collaboration must be ongoing, must avoid duplicative efforts, and must focus on downtown's future. The findings from this study, particularly the peer community best practices and the observations noted in the consumer survey results, reinforce the importance of collaboration as fundamental to downtown success.

   As an initial collaborative effort, the Town and its partners should work together to identify how to best manage and advocate for the Village and the overall study area. Multiple methodologies and approaches exist to maintain sustained focus on any downtown's growth and issues. The Town, its Redevelopment Commission, its Economic Development Commission, downtown Zionsville's businesses, property owners, and partner entities should clarify their management roles and responsibilities to ensure a vital downtown Zionsville.

This market study's longer-term recommendations are comprehensive and build upon the above recommendations and the study's analysis of downtown's markets and market-supported opportunities. These longer-term recommendations consist of three (3) sets of strategic action plans. For the Town, its partners, and its residents, incremental implementation of these plans will ensure the study area's vitality over time. These action plans specifically address: future Roles and Responsibilities for implementation of these study results; Image and Identity actions to guide the Town, the Chamber, and their partners in promoting and marketing the study area to investors of all types; and Business Development to focus on business growth through expansion and recruitment.

Parking Analysis

Levels of parking utilization are often a measuring stick to gauge the vitality of a surrounding commercial district. While not having enough parking can stifle a downtown, having too much unused parking can have equally negative impacts. Thus, the parking approach strives to balance providing enough parking to support the various businesses over time while also maintaining a district that remains consistent with Downtown's historic character, continues the pedestrian-scale streets and building patterns, and achieves the most desirable and productive use of available land.

General parking conclusions and recommended strategies are highlighted below:

- Parking demand currently peaks on weekdays at 12:00 PM during the lunch hour and on Saturdays at 10:00 AM, coinciding with the Farmer's Market. A similar utilization of public parking is also experienced on Saturday evenings at 7:00 PM resulting from patrons at the various Downtown restaurants.
- Overall, ample parking is currently available within the study area. However, during peak conditions, public parking is more limited than privately-owned parking and visitors may need to park a few blocks from their primary destination to find available public spaces.
- On a typical weekday, approximately 60 people park their vehicles along Main Street and in the adjacent public lots for six or more hours, suggesting use of primary convenient spaces by Downtown business owners and employees.
- Establish partial or full lease agreements with private property owners to allow public parking in privately-owned spaces. Such a strategy is intended to maximize the use of existing underutilized private parking Downtown without using valuable properties that may be best-suited for development and new viable business opportunities rather than additional parking.
- Establish an in-lieu parking fee policy that allows property owners to pay a fee to the Town for a waiver from providing their full off-street parking requirement. This policy:
  - Compensates the Town for use/maintenance of public parking
  - Promotes economic development by facilitating appropriate site design by not placing a full on-site parking requirement on smaller parcels to the point that developing the site is no longer feasible
- Designate peripheral or potential publicly leased private parking areas for Downtown business employees. This strategy is intended to free up some of the more convenient parking spaces for Downtown customers.

Ultimately, these action plans provide guidance for managing change in the Village and the remainder of the study area. Whether a new concept or an expansion by a current Village business owner, a potential new development, or an area entrepreneur looking for a Downtown location, market supported uses at the right locations within the study area will only increase Downtown Zionsville's considerable attraction power and its significance as a commercial district.

INTRODUCTION

PROJECT BACKGROUND

Downtown Zionsville, with its historic character; charm; mix of shopping, dining, and service options; and geographic location, is the center of community activity and pride. The bricks of Main Street and Downtown's authentic pedestrian-scale of buildings and infrastructure significantly contribute to the Town's identity and image to local residents as well as visitors from the surrounding region and beyond.

While the Downtown area is successful today, economic and development issues are constantly evolving and the Town recognizes the need to develop a strategy that helps guide future planning and economic development efforts to strengthen Downtown in the short-term and ensure it is viable for years to come. In order to gain and understanding of Downtown's current conditions and contributing factors, identify opportunities for improvement, and develop strategies to comprehensively foster economic growth, the Town decided to conduct a Downtown Market Study and Parking Analysis.

The study process and resulting recommendations would provide insight to both the existing and potential market and parking conditions in the Downtown and serve as an economic development and planning reference as Town Officials seek to strengthen Downtown Zionsville as a district serving local residents, visitors from other communities, and as a proud symbol of the community.

STUDY AREA

The project study area includes two distinct sets of boundaries; one encompassing the traditional Downtown district and a larger area that extends south to 106th Street to incorporate the Creekside Corporate Park for consideration in the market analysis component of the study. In general, the Downtown boundaries are defined by Poplar and Walnut Streets on the north, Sycamore Street on the south, Elm Street on the east, and 2nd Street on the west. The study area boundaries are illustrated on **Exhibit 1**.

STUDY AREA
EXHIBIT 1

STUDY METHODOLOGY AND SCOPE

For this study, the Town retained a multi-discipline project team of TADI (a transportation-focused firm) and BDI (a market analysis-focused firm) to assist Town Staff and a Project Steering Committee. Considering the interrelationship between economic development strategies and parking conditions and how they collectively contribute to the success of a downtown district, it is important that both key elements be considered together. While the study is not a land use planning or site design exercise, both components have been integrated throughout the study process to develop a range of market and parking recommendations that are intended to serve as a guide for Town Officials in future economic development and planning efforts for the Downtown.

The general approach for the study is outlined below:

- Collect information through various methods, including:
  - Interviews with key Downtown business owners, property owners, organization leaders, residents, and other stakeholders
  - Online consumer survey
  - Parking inventory and occupancy counts
- Identify existing strengths, challenges, and opportunities for Downtown market and parking conditions
- Engage the community in a public workshop setting to review existing conditions, summarize preliminary analysis, and solicit input on resident perspectives regarding opportunities to support and strengthen Downtown
- Evaluate Downtown's market potential, determine a target business mix, and identify new business profiles that match Zionsville's market and fulfill new opportunities
- Assess current and projected parking needs along with a review of solutions to address potential parking deficiencies, user group restrictions, visibility and wayfinding, policy adjustments, and overall access/circulation
- Develop strategies to position Downtown for strengthened short- and long-term business development and parking policies/accommodations to support growing needs of shops, restaurants, services, and residents

Through a collaborative study process, the project team worked closely with Town Staff and the Project Steering Committee through regular meetings and incremental review of information, analysis, and development of recommendations. Valuable feedback received along the way further informed and guided the analysis and development of recommendations to reflect the various points of view of those serving on the Project Steering Committee.

Ultimately, the recommendations developed through this study are intended to support existing and new businesses and enhance Downtown's market position to thrive in a manner that remains consistent with its authentic character and unique attributes.

PROJECT STEERING COMMITTEE

A Project Steering Committee was established to assist in guiding the study process; reviewing periodic information, analysis, and preliminary recommendations; and providing feedback to Town Staff and the project team through its progression. The committee members represent a wide range of community organizations and positions that reflect a variety of perspectives to inform the study process. Members of the Project Steering Committee include:

Kent Abernathy
Board, Economic Development Commission

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Board, Economic Development Commission

Julie Cole
Director, Chamber of Commerce

Tim Dall
HOA Roundtable Representative

Charlie Edwards
President, Economic Development Commission

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Business Owner

Steve Mundy
Town Council

Mark Plassman
Vice President, Redevelopment Commission

Bret Swanson
Board, Economic Development Commission

Tim Haak
Town Council

Wade Fulford
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COMMUNITY OUTREACH

Throughout the various stages of study, the project team solicited public input through a variety of channels including key stakeholder interviews, an online consumer survey, a community workshop event, and a discussion forum with two high school business and economics classes. These events, designed to gather insights, experiences, impressions, vision, consumer habits, opinions, and feedback, are an important component of the study to establish an understanding of existing conditions, engage a number of people in the process, and inform the strategy development.

A brief summary of these events and their purpose is outlined below with additional details summarized in subsequent sections and in the attached Appendix.

KEY STAKEHOLDER INTERVIEWS

The project team conducted a series of interviews with groups of individuals representing a variety of roles and perspectives related to Downtown. Invited participants included retail and restaurant business owners, property owners, residents, organization leaders, real estate brokers, and developers. During these discussions, common themes including Downtown's assets and issues were identified. Through five separate group discussions and follow-up calls, 16 people were interviewed along with 7 additional interviews subsequently conducted via phone. Information regarding common themes raised in the interviews is later outlined in a summary of Downtown's strengths, challenges, and opportunities.

CONSUMER SURVEY

On September 5, 2013, an online consumer survey was launched to examine the consumer preferences of Downtown visitors and patrons. The online survey was distributed through a variety of methods including links on the Town website, the project website, press releases, school announcements, social media outlets such as Facebook, and other referrals. When the survey closed on October 15, 2013, 901 responses were collected, including 381 open-ended responses to the survey's final question. Details of the survey results are summarized later in this report and in the attached Appendix.

COMMUNITY WORKSHOP

On November 13, 2013, a community meeting using a workshop format was held at Town Hall. The primary objectives included:

1. Share study parking and market/demographic data with residents and downtown stakeholders
2. Review Strengths, Challenges, and Opportunities and to generate additional ideas, concerns, and potential action steps from a wide range of constituencies
3. Obtain insights into how the broader community perceives Downtown's future

Existing parking conditions and preliminary Consumer Survey results were summarized to establish quantitative data collected to date, relate the data to some common perceptions, and for reference in starting to outline key areas of focus going forward. Attendees then visited stations setup to engage in discussion with moderators and other attendees regarding Downtown's Strengths, Challenges, and Opportunities to provide perspectives on what may be done to enhance the Downtown. Finally, residents participated in a brief visioning assignment, emphasizing Downtown's future. Attendees were provided blank newspaper headlines and asked to identify a signature event in or about Downtown that would be newsworthy in a decade. In addition to those residents in attendance, the event also attracted media coverage from coverage from the Zionsville News-Sentinel and WISH-TV 8. A summary of input received during the community workshop is presented in the attached Appendix.

HIGH SCHOOL STUDENT DISCUSSION FORUM

A joint discussion and input session was held on November 14, 2013 at Zionsville Community High School (ZCHS) with students with the cooperation of teachers Mary Grabianowski and Kyle Park. The objective of this forum was to gain the insight of students representing an important demographic for the future of Downtown, but to also expose the students to considerations and contributing factors that influence the success of a community's Downtown. In addition to the input received at the session, students were also provided with a slightly modified version of the project's Consumer Survey to gain additional input from a group that was generally underrepresented in the broader survey results. A summary of input received during the ZCHS session is included in the attached Appendix.

EXISTING CONDITIONS

This section of the report outlines the data collection and review phases of the study and summarizes the Downtown's current market and parking conditions.

LOCAL MARKET CONDITIONS

As the broader economy recovers from the economic downturn, the Indianapolis region has experienced substantial improvements in most local market indicators during the last year. The metro area's job growth and housing market are improving. For Indianapolis' north side and northern suburbs, these broader market trends have resulted in increased interest by the development community in all sectors—retail, housing, office and industrial. Increasing consumer confidence and spending power, combined with Indianapolis' lower cost of living, translates into retail market expansion by both independent business owners and national format retailers, such as Fresh Market. (Sources: Colliers International Retail Sector Reports, 2013.)

The attributes that make the Town of Zionsville attractive to Indianapolis area residents are similar to those that continue to attract new businesses and new development to Zionsville. Opportunities exist in study area and in other Town locations to accommodate businesses of multiple ownership and format types. Zionsville's high income, highly educated residents represent some of the Indianapolis region's most desirable consumers. Ultimately, new businesses that choose a Zionsville location, either in the Village or elsewhere, understand where and how they can be profitable.

MARKET CHARACTERISTICS

Demographics, shown below, are for Zionsville, pedestrian and drive time markets, and the Indianapolis Metropolitan Statistical Area (MSA) in Table 1.

Table 1: Market Demographics

Category	Town of Zionsville	Radii[1]		Drive Times[1]		Indianapolis MSA
		1 Mile	3 Miles	5 Minutes	15 Minutes	
Total Population	24,159	4,068	26,166	12,390	126,231	1,818,674
Population Density (per square mile)	930.13	1,074.59	936.1	1,027.33	931.24	475.75
Median Age	39.6	42.1	39.8	41.1	36.3	35.7
Employees	10,522	2,786	16,377	6,741	99,711	793,207
Jobs Per Household	1.3	1.6	1.8	1.4	1.2	1.1
% Bachelor's Degree or Greater	67.3%	57.5%	67.9%	65.7%	53.2%	31.10%
Average Household Income	$143,469	$122,205	$151,675	$145,635	$109,334	$73,662
Median Household Income	$101,712	$76,906	$109,113	$102,956	$69,620	$52,704
Per Capita Income	$50,768	$52,256	$52,865	$54,959	$43,019	$28,784
Estimated Consumer Expenditures	$326,210,726	$60,078,967	$447,505,147	$216,408,364	$1,552,289,292	$16,730,257,622

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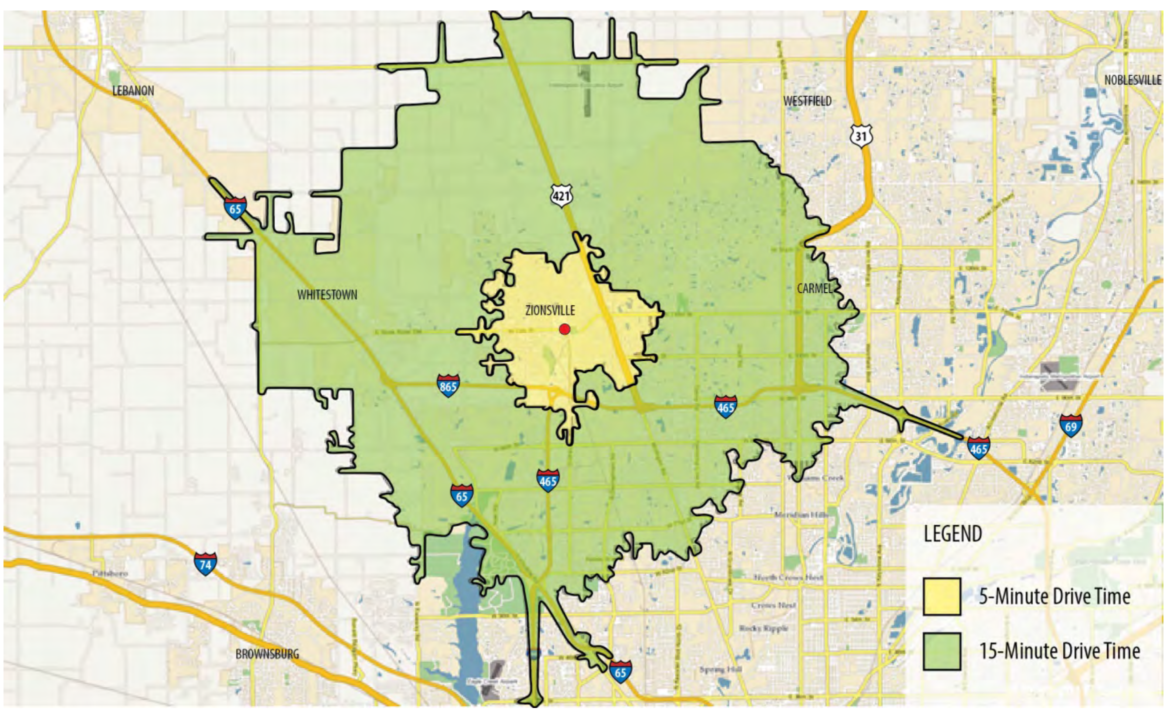
1 - Based on epicenter of 65 South 1st Street in Zionsville

In addition to the Town and the Indianapolis MSA, the markets include: a 1-mile, or extended pedestrian market; 3-mile, a typical developer market; 5 minute, or convenience, drive time; and 15 minute drive time, a destination market. Across all markets, the incomes and education levels are consistently high, less only in the overall Indianapolis market.

Zionsville lags slightly in jobs per household when compared with all markets but the MSA. Data from the U. S. Census Bureau and city-data.com indicates that 21.4% of Zionsville's total employees are also residents. Zionsville's Town officials are committed to local employment growth, given the Town's revenue reliance on its residential tax base. Adding to the local daytime population will generate additional sales for businesses located in the study area or in the Town. In addition to population, incomes, and education, the presence of a larger daytime population represents an important supplemental market, or source of customers, for nearby retailers and restaurants. According to a recent International Council of Shopping Centers' study (Office Worker Spending in a Digital Age), the average suburban employee spends $146.52 weekly on full service restaurants and fast food plus goods and services near their workplace. (This average includes all employees, even those that spend nothing.)

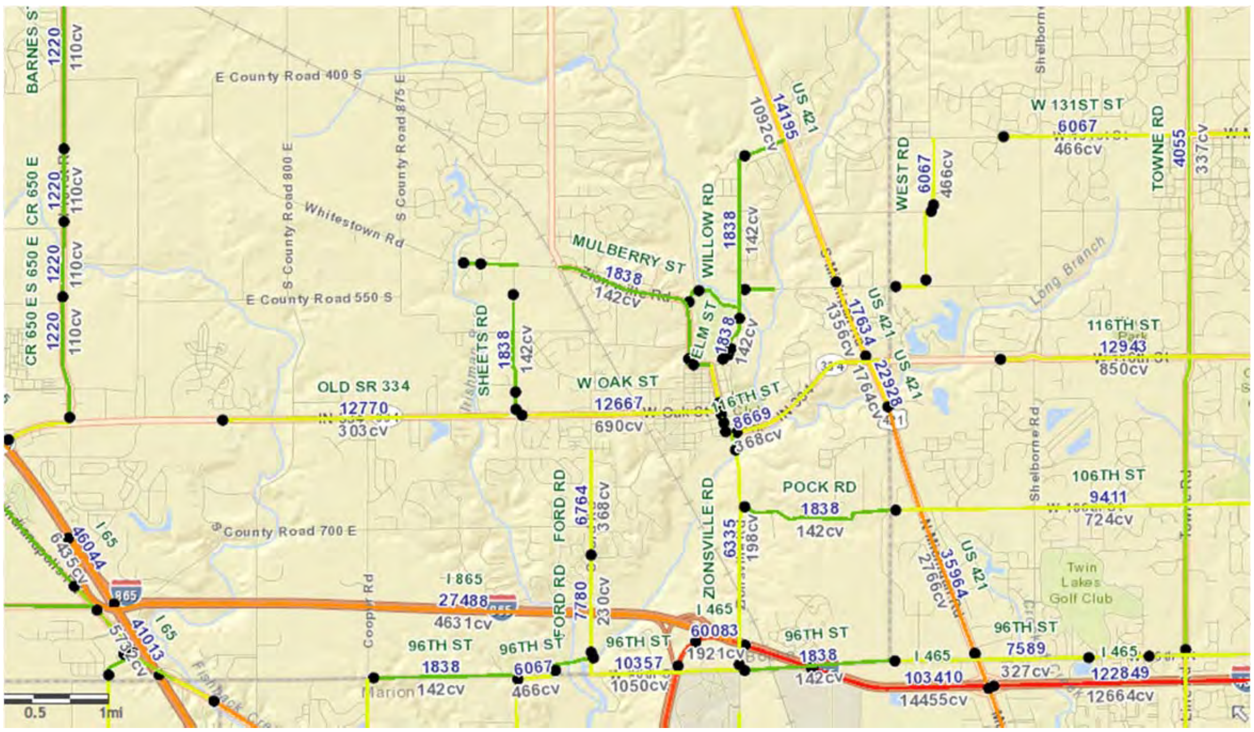
The consumer expenditure estimates for each Zionsville's market also display significant spending power. As described in this report's consumer survey results, about 89% residents and visitors drive to the study area to patronize stores or restaurants. The 5-minute and 15 minute drive times are shown below, and these markets will be key to study area businesses in capturing additional consumer dollars. The 5-minute drive time also generally represents about a 10-minute bike ride.

Figure 1: 5- and 15-Minute Drive Times



The Average Daily Traffic counts, or ADTs, for the Village and surrounding area are shown in Figure 2. The vehicular counts at the intersection of Zionsville Road and Sycamore Street are 8,669, with an additional 6,335 on Zionsville Road. Counts on West Oak Street, from 1st Street to Sheets Road, are 12,667 and increase slightly moving to the west. For a traditional downtown district, these nearby ADTs are good; many traditional downtowns lack similar visibility. The Michigan Road counts are significantly greater and increase from North to South (17,634 to 35,964). Michigan Road's auto orientation reinforces its desirability and visibility for retail developments with national and regional format tenants when combined with nearby adjacencies and corporate site location metrics.

Figure 2: Average Daily Traffic Counts (ADTs)



Source: Indiana Department of Transportation, 2011.

REAL ESTATE MARKET CONDITIONS

For the Indianapolis region, retail vacancies continue to decline and are now at 7.7% regionally. From a leasing perspective, overall average net retail rents throughout the regional market were either flat or declined slightly (1.2%) during the last year. The average triple net rent is $13.00 per square foot (PSF) and is expected to increase to an estimated $13.24 PSF in the next year. Retail vacancy and rental rates for Indianapolis sub-markets are shown below. Separate data for Zionsville from Boone County data is displayed following the regional data.

Table 2: Regional Real Estate

Submarket Retail Vacancy Rankings	Vacancy Rate	Y-O-Y Basis Point Change	Asking Rents	Y-O-Y % Change
1 Far North Hamilton County	3.5%	-90	$14.90	3.9%
2 Southeast County	3.9%	-20	$13.50	-1.1%
3 Northeast County	4.4%	-200	$16.75	6.3%
4 Northwest County	5.2%	-20	$16.16	-3.7%
5 South County	5.4%	-70	$12.96	-1.7%
6 Southwest County	5.8%	160	$13.38	-7.9%
7 Far West Counties	6.1%	-300	$14.05	2.0%
8 North County	8.2%	-60	$17.17	-8.6%
9 Putnam County	9.2%	-160	$3.81	-12.8%
10 Far Northeast Counties	10.1%	-40	$9.26	5.8%

Source: Marcus & Millichap, Retail Research Market Overview, Indianapolis Metro Market, 3rd Quarter 2013.

Boone County Sub-Market: Asking Rents	Retail	Office
Zionsville	$14-$15	$10-$16

Source: LoopNet Available for Lease Report for Boone County, IN.

Within the study area, project interviewees indicated that ground floor net rents in the study area are $14.00-$18.00 PSF. Office rents were noted as $13.00-$15.00 PSF. Asking rents throughout the Village and the remaining study area are about $15.00 PSF or negotiable, according to LoopNet and Co-Star listings. Real estate taxes have been estimated at $4.00 PSF.

Rental rates for other uses (office, industrial, and residential, or apartment) in the Zionsville area are also increasing with the slowly improving economy. The increases in office leasing and rental rates are primarily attributed to increased medical office occupancy and a 2% increase in regional employment. The regional office vacancy rate is projected to be 13.24% by year-end. The residential rental market will see effective rents increase by 3.6% for this year. The addition of new units and increasing housing sales will increase the regional residential vacancy rate to 8.6%. For the region's industrial properties, the growth in the logistics and manufacturing sectors continues to fuel area growth, particularly in Zionsville's neighboring communities. The overall market vacancy rate increased slightly (6 basis points, or bps) in the most recent quarter due to deliveries of spec space in the market's Southwest sector. The average lease rate for the Northwest sector is $3.42 PSF, and the sector vacancy rate is 6.65%. (Sources: Colliers International Regional Research and Forecast Reports-all sectors, 2013; Marcus & Millichap, Research Market Overviews for Indianapolis Metro Area-all sectors, 2013; LoopNet and Co-Star listings; LoopNet Sub-Market Report for Boone County, Indiana.)

VISITOR MARKETS

Downtown Zionsville's visitor markets have changed significantly over time. According to the Boone County Convention and Visitors Bureau (CVB), Zionsville's festivals function as the County's primary visitor destinations, and the Village is perceived as the showcase for County tourism. Like all CVBs, the County CVB's primary revenue source is hotel-motel tax generated by Lebanon's hotels, and Zionsville and its festivals function as the regional draw. Despite Zionsville's singular appeal, the combination of visitor sites in all Boone County communities lack general appeal, particularly for today's visitors including those travelling by motor coach.

According to the American Bus Association (the trade group representing the motor coach travel industry), the motor coach travel industry has changed dramatically over the last decade. The advent of Megabus and similar services, student bus services, and 'Baby Boomer' travel habits have all had an impact on the industry. Three (3) market segments are now the primary users of motor coaches—students, families, and groups. Motor coaches represent an inexpensive alternative mode of transportation for all three groups. Each of these user groups represents about 1/3 of the total bus travel market. The direct economic impact of all motor coach tourism in Indiana was estimated at $138,000,000 in 2012. Currently, the industry has been plagued by accidents, which has in turn, has subjected it to additional scrutiny and regulatory enforcement by the U. S. Department of Transportation and other federal agencies.

Within the group travel market segment, the nature and size of excursions has shifted in the last decade. Excursions are now more oriented to major destinations or events in specific locales. The travellers have become more discerning in where they want to visit. These destinations include major cultural venues to attend exhibits, performances, or sporting events, and casino visits. Shopping venues, such as the Village, are now rarely singular group destinations. The group sizes travelling now are also smaller, typically about 40 people, versus 50.

While no current statistics were available for Boone County, recent data from suburban Chicago (Lake County, Illinois CVB) can inform the scale of any likely motor coach opportunity for the Zionsville study area. Bus tours operating in Lake County represent specialty tours that include daytime visits to multiple communities often organized around a specific site visit. Stops to individual communities are about 2-2.5 hours in duration. Lake County's data estimates that each visitor spends an average of $70 per day. Assuming a similar average dollar figure per day for a visitor to Zionsville's study area and that half of that $70, or $35, is spent in downtown Zionsville, generating $1,000,000 in sales for businesses in the Village and nearby would require nearly 28,600 visits. For Zionsville, these numbers suggest that motor coach tourism will likely remain a supplemental, or 'bonus,' market at best for downtown Zionsville businesses versus a consistent revenue generator. Targeted programs to expand downtown's business visibility during the current special event cycle can improve today's visitor experience, resulting in return visits to merchants. Zionsville's pursuit of cultural district designation can also potentially supplement existing visitor numbers and special event programming.

COMPETITIVE CONTEXT

Nationally, retail sales are above pre-recession sales levels in overall figures and on a per capita basis. Overall retail vacancy rates remain fairly stagnant in most markets due to excess supply. Assuming consistent sales growth with an improved broader economy and job growth, leasing activity and occupancy are expected to increase. Major markets remain bifurcated. The best retail properties in the best locations, or Class A properties, continue to have low vacancies and retain investor interest. Class B properties are improving slowly, benefitting primarily from low vacancies in the Class A real estate. Class C properties remain challenged with high vacancy rates. The greater Indianapolis market generally reflects the national market and current trends. Retail vacancies for all property types in the Indianapolis area is 7.2% as of the first quarter 2014, compared with 7.6% for the same period in 2013. (See also Table 2: Regional Real Estate in Real Estate Market Condition section.) Overall retail vacancies in the Indianapolis area are projected to decline to 6.5% by the end of 2014, with asking rents increasing to $14.07 PSF on a net basis. (Sources: Marcus & Millichap's 2014 Indianapolis Annual Real Estate Market Outlook, Cassidy Turley Retail Market Report 1st Quarter 2014, Indiana Business Journal, LoopNet and Co-Star.)

Whole Foods on E. 86th Street in Indianapolis

Several retail development trends are also applicable to Zionsville and its nearby commercial locales. The exponential growth of Internet sales, now 6% of total U. S. retail sales, continues to affect certain retail categories, with other categories likely to follow. The use of mobile and tablets has only increased the pace of change. Related to e-commerce and the use of mobile technology are shrinking store sizes and linking retail with industrial distributions with the advent of same day delivery. Concurrently, successful retailers of all sizes are using both their in-store and e-commerce platforms to provide personal experiences in connecting with their customer bases. Multiple retail categories are revamping existing stores and seeking new locations. Grocers of all types, sizes, and formats are seeking new locations in and near Indianapolis and elsewhere in the U. S. Within the region alone, Whole Foods Market, Giant Eagle, Fresh Market, Earth Fare, and traditional grocers, such as Marsh, will open new stores. Aldi and Walmart's Neighborhood Markets plan major national expansions. Other growth categories include multiple health and fitness formats and established discounters, such as Nordstrom Rack and the various dollar store competitors. From the dining perspective, fast casual concepts, such as the various upscale hamburger formats, continue to expand.

During this market study, 25 major shopping locales—in and near Zionsville and throughout the Indianapolis area—were visited to understand the regional nature of Zionsville's competitive environment. These site visits included nearby downtown districts in Carmel, Westfield, and Noblesville, commercial corridors, such as Broad Ripple, and major malls. Within a 15-minute drive time, consumers have access to centers, retailers, and restaurants at all price points, in all formats, and in all business categories. These same options will continue to track current and evolving real estate market trends. New retail development plans in and near Zionsville will remain a constant in good economic times, given the available land and the trade area's highly educated, high-income households with disposable incomes and growing family households in their highest expenditure years. The Town's commitment to increasing its employment base will incrementally increase the daytime population near the study area, providing additional 'bonus' revenues to study area businesses.

For downtown Zionsville, this broader competitive context will continue to change and evolve. Downtown's asking rents are comparable to the regional market, given the Town's market strengths. Rents in vintage buildings and new construction are generally similar throughout the market. To continue to succeed, downtown Zionsville needs to position itself within the Indianapolis marketplace with strong tenancies 'on the bricks.' In gaining successful tenants in the right locations throughout the Village and the study area, downtown's established competitive realities—access to consumers with spending power, multiple successful niches and destination businesses, local commitment, and visitor attraction—combine with authenticity to establish a platform for downtown's economic growth and for a higher profile regional identity.

CONSUMER SURVEY

A consumer survey, distributed online, was conducted between September 5, 2013 and October 15, 2013. The consumer survey consisted of twenty-four (24) questions; twelve (12) questions addressed specific consumer experiences and five (5) questions solicited information for the parking component of this overall study. The survey's focus was to identify market-supported uses for the downtown study area, including the Village. This report section summarizes the overall consumer survey results. A detailed analysis of survey responses and results is provided in an Appendix to this report. A second Appendix identifies key consumer survey results useful for future business recruitment efforts by the Town and its partners.

After obtaining agreement from Town officials on the contents of the consumer survey instrument, the survey link was distributed through the Town's website and publications, the project website, local school communications, print and social media, and virally by the Zionsville Chamber of Commerce, businesses, and residents. At survey closing, 901 responses were received. The survey reliability, or confidence level, is 99% with a margin of error of +/- 4.2%. This means if you interview 901 people, finding that 50% of them answer a question in a particular way and desiring the survey confidence level to be 99%, the corresponding confidence interval is +/- 4.2%. Therefore, you are 99% certain that the true population proportion falls into the range from 45.8% to 54.2%. Also, at this confidence level and sample size, there is slightly less than a one in twenty chance that the true population proportion will fall outside this calculated range. As the sub-groups represent smaller samples with greater variability, the difference between the full sample and the sub-groups must be larger, perhaps 10%, to represent a significant difference.

Fundamentally, these consumer survey results identify *how* respondents behave, not *why* they behave the way that they do. These survey results identify respondent behaviors and attitudes about Zionsville's shopping and dining options and what they spend and where. In addition, one important objective of this consumer survey is obtaining data about specific businesses or business categories that would affect additional purchasing. Responses to certain specific questions identify non-Zionsville stores and restaurants where respondents made purchases. These response lists offer potential leads of either businesses or business categories likely to be good additions to the study area's existing commercial properties and future developments, and these lists represent tenanting opportunities for the Town's property owners and managers. Understanding these tenant possibilities can aid recruitment of best new businesses to the optimal study area locations and can open doors to these same potential tenants by providing market data unavailable from other resources.

In addition to this larger consumer survey closed in October, a similar survey was conducted with two classes at ZCHS. Current Zionsville population data indicates that about 1/3, or 33.7%, of Zionsville residents are under 20 years of age (Source: U. S. Census Bureau). The larger survey had yielded one response from that age group. Given Zionsville's youth numbers, Town officials and the Steering Committee suggested additional input from this age group would be beneficial. This input was obtained through a joint focus group with both classes and through a consumer survey. This consumer survey instrument, provided to the high school classes via an online link to their instructors, was modified to respect concerns about student privacy. This student survey was opened on October 28, 2013 and closed on November 21, 2013, receiving 49 responses. Every student from both classes completed the survey. These student survey and focus group results are described separately below.

The larger consumer survey results document both the responses from the full sample and the response variations among four (4) subgroups.

- Long-term residents, or respondents who have lived in Zionsville for 5 or more years (N=563) *Statistically Valid Sub-group*. The long-term resident sub-group skews older than the full sample. A higher percentage of these long-term residents live within 5-minutes of downtown compared with the full sample (62.7% versus 56.6%). This sub-group also spends slightly more on meals away from home than the full sample.
- New residents, or respondents living in Zionsville for less than 5 years (N=193) *Small Sample Size.* This sub-group skews slightly younger than the full sample and has different observations about downtown from Long-term residents.
- Respondents who never shop, or make a purchase, in downtown Zionsville (N=173) *Small Sample Size.* This sub-group is younger. Nearly 95% drive to downtown Zionsville when they come to dine. 88.8% are Zionsville residents and nearly 62% have lived in Zionsville for five (5) years or more. Their households are slightly more likely to fall into the 'Other' category versus the other more traditional categories noted in the survey instrument.
- Respondents in the 35-44-age category (N=252) *Small Sample Size.* This age category is an important market cadre and typically exhibits with the highest levels of consumer spending.

The sub-group for long-term Zionsville residents represents a statistically valid survey sub-group, and these results have a 95% confidence level with a margin of error of +/- 4.0%. The smaller sample sizes noted above mean that response variations greater than +/-10% most likely suggest true differences from the populations as a whole. One additional sub-group, Non-Residents, was analyzed. The responses from this small sub-group (N=43) were similar to those of the full sample.

These consumer survey findings reflect the overall results from the 901 survey respondents. Among the respondents, 858 were Zionsville residents.

- Respondents shop and dine in Zionsville. Most routinely shop in the Boone Village area, followed by downtown. Survey respondents also dine in the same areas, most frequently (25.6% at least weekly) in downtown Zionsville.
- Respondents frequent Zionsville's downtown area, but most make only quick trips—about 40% visit downtown for one (1) hour or less. Few stay for more than two (2) hours or routinely visit the area with out of town guests.
- Respondents who indicated that they never shop in downtown Zionsville dine in downtown restaurants, but they dine less frequently than the full sample and other sub-groups.
- Respondents patronize 'brick and mortar' stores and purchase online, reflecting the broader national trend of shopping through multiple channels.
- Over 50% of respondents would spend more in six (6) business categories. These categories are: Specialty foods, Bakery, Grocer, Ice cream/candy, Home accessories, and Women's apparel. These categories represent two potential opportunities: strengthening existing Village business clusters, such as women's apparel or specialty foods, and recruitment options suitable for Village's tenancies and for potential nearby development.
- Respondents were generally very satisfied with downtown's physical and appearance factors. Over 80% of the full survey sample rated general safety, general attractiveness, and cleanliness as excellent or above average.
- Respondents expressed overall satisfaction with parking convenience and traffic flow in the study area, including in the Village.
- Certain satisfaction factors controlled by the Village's businesses, specifically store hours and variety of available goods, received the lowest satisfaction ratings from the full survey sample.
- The importance of casual dining options was noted throughout, including by restaurant format. Entertainment options for after dining were also noted as desirable in the survey results (and in the project workshops).
- Zionsville's survey respondents indicate that it is most convenient for them to shop at the following times: Saturdays (78.5%), Sundays (68.1%) and early evenings, or 5PM-7PM (58.7%).
- Among the Zionsville residents responding to the survey, 62% have lived in the Town for five (5) or more years.
- Nearly 49% of respondents indicate that their households spend $75 or more on meals away from home each week.
- Respondents, in their comments throughout the survey results, want a great downtown Zionsville and indicated that the Village was one of the amenities important to their choice to live in Zionsville.

As noted, the full summary and analysis of all the survey questions, responses, and feedback to open-ended request for additional suggestions or opinions regarding Downtown are provided in a separate document included in the Appendix to this study.

STRENGTHS / CHALLENGES / OPPORTUNITIES

Based on field visits, a walking tour, review of study materials, and interviews with key stakeholders, several common themes began to develop as part of a competitive assessment of Downtown. These themes were categorized as Strengths, Challenges, and Opportunities. During a portion of the community meeting held in November 2013, these themes were outlined and attendees visited stations for each theme to discuss and provide additional input. The themes outlined from initial steps are summarized below. All themes, plus additional points suggested by community meeting attendees highlighting Downtown's Strengths, Challenges, and Opportunities, are included in the Appendix.

Strengths

- Demographics and strong market characteristics ensure continued interest by investors and businesses
- Established independent businesses are a solid basis for improving and diversifying the overall business mix. These businesses attract both residents and visitors.
- New tenants, including entrepreneurs and established regional multi-location retailers, have recently opened storefronts
- Community pride, history, and authenticity of the Downtown
- Ongoing façade improvement programs have been important to improving Downtown's appearance
- Location within a Tax Increment Financing, or TIF, district

Challenges

- Improve the overall quality of lease space
- Code enforcement and regulatory processes are perceived as inconsistent
- Frequency and communications regarding street closings for special events
- New proposed developments have created uncertainty about how Downtown Zionsville can effectively compete locally
- Too many/disconnected local organizations addressing Downtown's economic development
- Perceptions that Downtown was more economically viable in past years with:
    - Bus tour business
    - Fewer ground-floor service businesses
- Use of premium parking spaces by business owners and employees instead of customers
- Maximize use of existing parking inventory

Opportunities

- The ability to leverage Zionsville's unique setting "on the bricks" and authentic character are a key competitive advantage
- Unique businesses capable of differentiating their product or service and attracting customers from throughout the Indianapolis region
- Town, businesses, and Downtown stakeholders can partner to pursue a comprehensive, market-supported vision for Downtown's sustained economic success
- Improving Downtown's economic fundamentals will address changing needs of residents and visitors (e.g., ID potential supplemental markets for attraction, promotional efforts such as co-marketing)
- Parking strategies (e.g., designating employee parking zones, time restrictions, etc.) can ensure convenient visitor parking options
- Enhanced regulatory enforcement and processes will improve and maintain Downtown Zionsville's appearance and market appeal.
- The downtown's location within a TIF district provides greater options for a wide range of partnerships with the private sector to improve Downtown Zionsville both physically and economically.

PARKING INVENTORY

All parking spaces in the Downtown study area were inventoried by block face and type for preparation of the parking utilization and turnover counts. The Downtown parking supply is categorized as public/private and on-street/off-street in **Table 3**. **Exhibit 2** illustrates the parking supply included in the parking utilization and turnover surveys.

Table 3. Downtown Parking Inventory

Parking Type	Number of Spaces
Public	432 spaces
On-Street	*357 spaces*
Off-Street	*75 spaces*
Private	432 spaces
On-Street	357 spaces
Off-Street	507 spaces
TOTAL	864 spaces

PARKING INVENTORY
EXHIBIT 2

PARKING UTILIZATION AND TURNOVER COUNTS

Parking Utilization

In order to quantify and understand existing parking characteristics throughout the Downtown study area, parking utilization and turnover counts were performed on Thursday, September 12 and Saturday, September 14, 2013. On each day, the number of occupied parking spaces, organized by on-street block face or off-street lot location, was documented hourly from 10:00 AM to 8:00 PM. These dates and time periods help to provide a full profile of parking utilization throughout a typical weekday and the busiest weekend day. Aside from the weekly Farmer's Market held at the south end of Main Street, no special events were scheduled. This time period includes the anticipated peak conditions and covers the hourly fluctuations in parking demand Downtown throughout much of the day from when most businesses are open to lunch crowds to afternoon shopping to dinner and evening visits.

Tables 4 and 5 summarize the parking utilization during the Thursday, September 12th weekday count and the Saturday, September 14th weekend count, respectively. Complete parking utilization tables for each hour and location are included in the attached Appendix.

Table 4. Downtown Parking Utilization (Weekday[1])

Type	Supply	Occupied Spaces / Percent Utilization										
		10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM
Public	432	236	280	332	312	269	255	251	243	260	255	229
		55%	65%	77%	72%	62%	59%	58%	56%	60%	59%	53%
Private	432	196	199	199	203	210	203	158	138	108	90	57
		45%	46%	46%	47%	49%	47%	37%	32%	25%	21%	13%
On-Street	357	207	235	269	261	231	222	218	194	206	197	176
		58%	66%	75%	73%	65%	62%	61%	54%	58%	55%	49%
Off-Street	507	225	244	262	254	248	236	191	187	162	148	110
		44%	48%	52%	50%	49%	47%	38%	37%	32%	29%	22%
TOTAL	864	432	479	531	515	479	458	409	381	368	345	286
		50%	55%	61%	60%	55%	53%	47%	44%	43%	40%	33%

1 - Data collected Wednesday, September 12, 2013

- Peak Hour

Table 5. Downtown Parking Utilization (Saturday[1])

Type	Supply	Occupied Spaces / Percent Utilization										
		10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM
Public	432	265	267	273	263	256	217	205	219	244	261	252
		61%	62%	63%	61%	59%	50%	47%	51%	56%	60%	58%
Private	432	165	160	138	132	119	113	95	72	59	62	52
		38%	37%	32%	31%	28%	26%	22%	17%	14%	14%	12%
On-Street	357	212	213	216	209	213	174	164	165	188	199	195
		61%	61%	62%	60%	61%	50%	47%	48%	54%	57%	56%
Off-Street	507	210	205	188	178	153	147	127	117	105	115	101
		41%	40%	37%	35%	30%	29%	25%	23%	21%	23%	20%
TOTAL	864	430	427	411	395	375	330	300	291	303	323	304
		50%	49%	48%	46%	43%	38%	35%	34%	35%	37%	35%

1 - Data collected Saturday, September 14, 2013

■ - Peak Hour

Parking Turnover

In addition to counting the number of vehicles simply parked each hour, additional detail was documented at key on-street and off-street locations to understand parking turnover – how frequently spaces are used over the course of the survey period – and duration. To collect these characteristics, partial license plate data was collected to track a parked vehicle's continued presence in each hourly circuit.

Turnover and duration data was collected in the following key public parking areas:

On-Street

- Main Street - *Sycamore Street to Walnut Street*
- 1st Street - *East side between Pine Street and Oak Street*
- Hawthorne Street - *Main Street to 1st Street*
- Pine Street - *Main Street to First Street*

Off-Street

- Former Shell Lot - *SW Corner of Main/Pine*
- Friendly Lot + Former PNC Lot - *SW Corner of Main/Hawthorne*

Table 6 summarizes the measured weekday parking turnover and average duration for the key on-street and off-street locations.

Table 6. Downtown Parking Turnover and Duration (Weekday)

Location	Turnover (veh/space)	Average Duration (hours)
On-Street[1]	3.7	2.0
North of Oak Street	*2.9*	*2.3*
South of Oak Street	*4.4*	*1.8*
Former Shell Lot	3.1	2.6
Friendly + Former PNC Lot	3.0	2.2

1 - Includes Main Street, Pine Street, and Hawthorne Street

OBSERVED TRANSPORTATION CHARACTERISTICS

While not directly parking-related, the following highlights general observations of traffic, pedestrian, bicycle, and signing characteristics in the Downtown area.

Pedestrian Patterns

During field visits and parking data collection, pedestrians were observed comfortably walking throughout the Downtown area. Vehicle speeds along Main Street are low and pedestrians appeared to cross with a sense of safety. Some consumer survey responses suggest that some pedestrians feel sight lines along Main Street can be challenging, particularly with parked vehicles along both sides of the street and the kinked alignment through the Oak Street intersection. However, observations and experiences crossing the Main Street felt safe. The rest of the Downtown area appears to be very walkable and parking off Main Street along side streets, Elm Street, or west of 1st Avenue allows for a comfortable walk to other locations Downtown. It should be noted that experiences during the parking survey and from watching pedestrians during various field visits indicate that crossing 1st Avenue is not nearly as comfortable as the rest of the Downtown area. This is mostly due to the street serving higher traffic volumes traveling between Oak Street and the Main Street-Zionsville Road/Sycamore Street intersection as well as the design character being less pedestrian-oriented. The pedestrian volumes crossing 1st Street are also less than those across streets like Main Street; thus, motorist expectations for pedestrian crossings are relatively lower. During the Farmer's Market, the increase pedestrian volumes crossing 1st Street appeared to result in more frequent yielding of motorists to crossing pedestrians. At other times though, pedestrians generally wait for gaps in passing traffic or walking between vehicles queued northbound along 1st Street. Drivers occasionally stopped for pedestrians crossing the street.

Bicycle Patterns and Parking

Observe bicycle traffic along Main Street and in the Downtown area was generally concentrated on Saturday and coinciding with the Farmer's Market in particular. Limited bicycle parking options are available, but outside of the Farmer's Market, they were lightly used. During the Farmer's Market, bicyclists were primarily observed riding along Main Street and in the southern portion of Downtown. Bikes were parked at the racks near the Former Shell Lot, secured to trees and sign posts on Main Street next to the Market, and west of 1st Street in front of the Dairy Queen. With future regional trails planned to connect with Downtown, bicycle traffic will likely increase on a more regular basis.

Image 1. Bike Parking at the Former Shell Lot

Image 2. Bicyclists Crossing 1st Street at Pine Street

Visibility, Signing, and Wayfinding

All public parking in the Downtown area maintains good visibility for visitors in search of an available space. Public off-street parking is clearly visible from both Main Street and 1st Street and signed as such. While some privately-owned parking areas are either along or adjacent to streets, some lots are situated in the middle of the block (such as at Bender's Square) and hidden from buildings along Main Street and Elm Street. As private parking lots, this is not necessarily a bad thing as views of parking lots are typically not as pleasing to look at and are not consistent with the Downtown character. Most private parking in the Downtown area is also signed with restrictions for the permitted users; typically customers or employees of designated businesses.

Image 3. Public Parking Sign for Former Shell Lot

Image 4. Private Lot Parking Restriction Sign

In terms of street and wayfinding signage, the most noticeable signs are those indicating one-way traffic flow and directions to "Additional Shopping, Dining, and Services" along east-west side streets such as Pine Street. While they are attractive and high-quality posts/signs and certainly helpful for pedestrians strolling along Main Street, these signs may be considered as confusing for motorists when these signs are mounted on the same post and direct visitors in a direction that is opposite of the one-way traffic flow.

Image 5. Side Street Wayfinding Sign at Main/Pine

Image 6. Looking Southbound on 1st Street North of Oak Street During a Weekday Morning

Loading/Delivery Trucks

During the weekday mornings, several trucks delivering goods to Downtown restaurants and shops were observed primarily curbside along 1st Avenue. As the major traffic route through the Downtown area, the curbside loading activity impacts traffic flow, in the area.

REVIEW + ANALYSIS

This section of the report outlines the market and parking evaluation with a view towards addressing existing issues and leveraging Downtown's strengths to identify and develop a set of recommendations.

PEER COMMUNITIES

The project Steering Committee and Town staff identified five (5) peer communities for best practices and comparison community research as part of this market study. The peer communities identified are suburban communities located throughout the Midwest with market characteristics similar to those of Zionsville. Each community also has a traditional downtown district like that of Zionsville. The five peer communities examined within this section are: Wilmette, Illinois; Rochester, Michigan; Dublin, Ohio; Worthington, Ohio; and Pewaukee, Wisconsin.

The peer assessment process consists of three (3) steps. After the review of each peer's market characteristics, research about each community's downtown district—its business mix, real estate market, management structures, promotion and event schedule, and recent local media—was conducted. After this research was completed, phone interviews were scheduled with municipal economic development staff and with the downtown management or merchants organizations in each community. Three (3) categories of information were discussed during each interview:

- Their overall downtown business mix, including unique businesses or business categories succeeding within each downtown and what kinds of tenants are seeking downtown lease space;
- The property ownership and real estate issues specific to each downtown, including recent development or redevelopment and each community's approach to downtown development;
- Their downtown economic development programs and strategies, including incentives, practices in addressing market challenges, unique approaches to business development, overall downtown management, and most successful partnerships.

Ultimately, this peer community assessment seeks to identify successful strategies, or what is working, in these communities to inform the implementation recommendations for downtown Zionsville. In certain instances, either avoiding or modifying less successful approaches to local downtown revitalization efforts may also prove relevant for Zionsville's downtown work.

Comparison Demographics

Key demographics for Zionsville and the five (5) peer communities are presented in **Table 7**.

Table 7. Peer Community Demographics

Key Demographics	Zionsville	Wilmette, IL	Rochester, MI	Dublin, OH	Worthington, OH	Pewaukee, WI (Combined)
Total Population	24,159	27,404	13,050	44,083	13,920	23,095
Total Households	8,081	9,903	5,685	15,885	5,852	9,473
Population Density (per Sq. Mi.)	959.78	4,891.39	3,407.30	1,996.58	3,406.11	908.17
Median Age	40.6	45.6	38.2	38.1	45.1	43.2
Employees	10,522	8,251	11,167	33,711	11,930	23,095
Bachelor's Degree or Higher	65.80%	78.30%	53.50%	66.30%	65.90%	42.20%
Average Household Income	$138,954	$189,066	$108,466	$140,586	$107,059	$99,731
Median Household Income	$101,230	$124,846	$69,505	$103,054	$79,847	$78,198
Per Capita Income	$50,799	$68,384	$47,252	$50,714	$45,197	$42,333
Owner Occupied Housing Units	77.4%	86.8%	61.7%	77.1%	82.7%	77.7%
Renter Occupied Housing Units	22.4%	13.1%	38.2%	22.8%	17.2%	22.1%
Estimated Retail Demand	$246,422,014	$315,140,710	$155,030,171	$499,806,969	$167,415,914	$272,761,488

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The total populations for each peer range from just over 13,000 to 44,000+ in Dublin, Ohio, with most peers similar to Zionsville. Population densities vary, with Zionsville and Pewaukee significantly less dense than the remaining peers. Much of this variation in population density is a function of local housing types. Zionsville and Pewaukee have substantial numbers of single-family homes with larger lots, despite their proximity to their respective cities, Indianapolis and Milwaukee. In contrast, Wilmette, the densest community, has generally smaller lot sizes and has multi-story condominium buildings located throughout the community. Dublin and Pewaukee have much larger employment bases than the remaining peers. Wilmette has the highest incomes in all categories, in addition to the highest percentage of owner occupied housing units. Pewaukee and Dublin have the largest percentages of renter occupied housing units for differing reasons—Dublin has a significant amount of rental housing units for job relocations to the Columbus area, and Pewaukee has short-term vacation rentals, given its lake and river features. Overall, each peer community has significant retail demand, or spending power, attractive to developers and to retailers and restaurants of all sizes and formats.

Wilmette, Illinois

Current Conditions

Wilmette's downtown area is bi-furcated by Metra's commuter rail tracks. To the immediate west is Green Bay Road, a more auto oriented corridor. The traditional downtown is located east of the railroad tracks and encompasses about nine blocks. Downtown's ground floor businesses are primarily independently owned or franchises. Important destination businesses include the Village Theater, an art house cinema, and DeGiulio Kitchen Designs, a nationally known kitchen designer and showroom.

From a policy perspective, much of the Village's economic development emphasis is to support business growth. The Village of Wilmette staff and the local Chamber work together to provide or support programs to enhance the downtown district. Downtown's merchants join together to organize three (3) retail promotions each year. Downtown's current vacancy rate is about 7.6%, about twice the typical vacancy rate of about 4%. Downtown ground floor rents are currently an estimated $22 PSF on a net basis, with add-ons averaging about $10 PSF. The Village regularly monitors downtown rental rates.

Wilmette's downtown footprint includes three (3) sizeable potential redevelopment sites. One site, a former Ford dealer site, on Green Bay Road, had two pre-economic downturn development proposals. The current owner of the site is attempting to acquire adjacent parcels to enable a larger development. A second site is Village-owned within the downtown core and is currently under contract. The third site is a large Chase Bank office building, again located in the downtown core. This Chase building abuts Village owned parcels, currently serving as Metra commuter parking. While this office building is no longer fully occupied, Chase has ten years remaining on their lease. The Village continues to have ongoing conversations with Chase and the owners about this property. (Any Metra parking would need to be fully replaced in any redevelopment option.) For each of these three sites, the Village envisions proposals with density, probably five stories, and a mix of uses, but primarily residential.

Challenges

Wilmette's Village and Chamber officials face three (3) challenges in their work on behalf of downtown:

- Downtown leadership vacuum. While the Chamber and the Village work to provide support for downtown events, no leadership has emerged from among downtown's business owners to organize events, advocate for downtown business interests, or communicate with both the Village and the Chamber. Both entities hope that the addition of new businesses and owners will facilitate changes in attitude among downtown's businesses.

- Long-term vacancies. Wilmette's downtown has several long-term vacancies in the downtown core. Village staff attributes these vacancies to unsophisticated ownership. Prospective downtown tenants have opted not to locate in downtown Wilmette due to these owners and the condition of their vacant space.
- Downtown business development. The Village and the Chamber would like to see a stronger mix of retail businesses, particularly retailers with goods at higher price points, and additional restaurants and entertainment venues in the downtown area. The Village

Successes/Best Practices

The Village has employed hands on communications strategies to incrementally improve downtown's economy. Ongoing outreach to downtown's property owners has been important to ensuring reinvestment in tenant spaces and downtown's vintage buildings. This includes routine meetings and monitoring rents, as noted. For the existing long-term vacancies, the Village staff has started to take a sterner approach to regulatory enforcement with their problem property owners. This approach has recently been initiated to mitigate market and business uncertainties caused by long-term vacancies in prime locations.

On the tenant side, the Village staff works with business owners new to the Village throughout the occupancy process to shorten processing times for permitting through Village departments—Zoning, Building, Finance, and the Liquor Commission. The Village conducts courtesy walk-throughs to help new tenants improve their space and adhere to local regulations. These efforts have resulted in increased small business owner interest in downtown locations and in their 'comfort level' in dealings with the Village.

Village staff has also noted two (2) trends in downtown's newer business tenants and in the types of businesses interested in a downtown location. First is businesses selling or providing more than one product or service. As examples, a downtown retailer sells cookware, offers cooking classes, and rents their classroom space for private parties. One yoga studio offers daytime yoga and fitness class and evening dance and acting classes. Additional restaurants are now considering downtown Wilmette locations. Most important for the Village is that most are experienced restaurant operators. Within the last year, six (6) new and varied restaurants have opened.

Rochester, Michigan

Current Conditions

Downtown Rochester's opportunities for tenant recruitment are shaped by two (2) competitive factors. First, downtown's location within the three-mile radius of Oakland County's (and suburban Detroit's) major lifestyle mall, and any of the mall's major retail tenants are legally restricted under their lease terms from considering a downtown location. Second is the presence of multiple, highly competitive downtowns proximate to Rochester. Other Oakland County communities, including Ferndale, Royal Oak, and others, have successful downtowns with unique appeal in their business mixes and promotional activities.

Despite this strong competitive environment, the downtown vacancy rate is about 4%, and little ground floor lease space is available to potential tenants. The percentage of ground floor, independent businesses is estimated at 90%. The City of Rochester and the Rochester Downtown Development Authority (DDA) work together on business development and recruitment activities. City staff assumes the lead in this process with the DDA as its partner on downtown specific business development. The DDA uses its downtown marketing programming to support downtown's economic growth. The DDA's promotions now emphasize broader consumer attraction. Their primary focus is special events that attract a wide audience to familiarize regional consumers with downtown Rochester and its businesses. The DDA also conducts an extensive outreach program to customers and visitors, including electronic and social media combined with traditional communications.

Rochester's downtown area is also experiencing renewed developer interest, particularly in residential development. Two projects were recently approved by the City Council—one is a 70-unit traditional, stacked flat condominium development, and the second is a 176-unit detached unit apartment complex to be constructed in two phases. Rents will be $2,000/month and above for these rental units. (City and DDA staff emphasized that these proposals came from a Detroit area developer with a reputation for high-quality projects.) Both developments occupy portions of a former paper mill site adjoining downtown Rochester and prominently feature pedestrian access to the nearby downtown, including access via Rochester's trail system. Prior to these proposals, downtown's most recent residential development had been a 16-unit live-work condo development. Sales for this project were stymied as a result of the real estate crash. The units now include both office and residential tenants.

Challenges

In addition to downtown Rochester's strong competition, Rochester's City Council is considered by locals to be dysfunctional. Bickering and political posturing are an unfortunate part of how decisions are made, if a decision is made. Consequently, local partners and staff work together to ensure local economic development successes work, engaging in the political process when necessary.

Successes/Best Practices

The Downtown Rochester DDA is nationally recognized as a programmatically strong and well-funded downtown organization. The DDA applies the National Trust for Historic Preservation's Main Street Four-Point Approach® to its commercial district revitalization work. As noted above, the City and the DDA maintain a strong, mutually supportive partnership, particularly on economic and business development issues. Local stakeholders truly believe that the downtown's economic strength is the result of sustained local collaboration.

Rochester's emphasis on broader attraction represents a potential way to assess or consider marketing and event programming in downtown Zionsville. The DDA's marketing focus exposes as many people as possible to downtown Rochester and its businesses through high quality events with different marketing objectives. Engaging the downtown businesses in these events and their underlying purpose helps downtown's business owners understand how they can capitalize on any individual event. The DDA continues to reinforce that their ultimate goals are to strengthen sales in downtown's businesses and to grow downtown's economy. (DDA staff also readily acknowledges that certain negative business owners will never respond to outreach or programs.) These same events and other marketing activities also support what the DDA terms, 'organic branding.' Through their wide range of marketing efforts, the DDA believe that it makes memories and tells the story of downtown Rochester, reinforcing why consumers and visitors want to return to their downtown.

In addition to marketing programs, the DDA also works with downtown's property owners to ensure that vacancies are filled with suitable downtown businesses. This type of outreach represents part of their partnership with the City in managing downtown's mix of businesses. The DDA understands their downtown lease space and who uses downtown Rochester through their merchant relationships. Most important, the DDA and its partners recognize that their mix will evolve, responding to changes in consumer behavior and business formats.

Dublin, Ohio

Current Conditions

The City of Dublin's vision for Historic Dublin, the community's traditional downtown, recognizes the area's small size and emphasizes its special and unique character in building stock and in business opportunities. Consequently, the City has worked to bring events, develop a pedestrian friendly, add density in and near downtown, and foster the growth of unique businesses, including its regional dining and entertainment cluster.

The City and the Historic Dublin Business Association (HDBA) maintain a strong partnership in supporting and attracting the district's locally owned businesses. Both work with other local partners to conduct specific work to strengthen the district, and both partners view their downtown as the appropriate location for 'local entrepreneurs.' Dublin's downtown vacancy rate is low, estimated at 3%. Retail, as a component of their overall business mix, is increasing, according to City staff and the HDBA. (Dublin's downtown includes two chain stores—Starbucks and Jeni's Splendid Ice Cream, based in the Columbus area.) Both partners have defined roles in special events and business recruitment and retention within Historic Dublin. Both partners also work in tandem with the Dublin Convention and Visitor's Bureau (located downtown), Dublin's Chamber, and the local Arts Council to attract visitors, including those staying at Dublin's many nearby hotels, to the downtown's restaurants and stores. An estimated 50% of Dublin's Hotel-Motel Tax is used to support events and visitor marketing.

Much of Dublin's downtown is part of a National Register district, and the area includes several individual National Register listings. In addition to these historic buildings, a local developer commenced Dublin's newer downtown development in the mid-1990s by acquiring a series of adjacent downtown parcels. This in-fill project served as a catalyst for the surrounding blocks, resulting in two subsequent in-fill developments. All were completed in the late 1990s. These smaller developments are also compatible in scale and character with existing downtown buildings--2-3 story mixed-use projects with office and/or residential in the upper floors.

Challenges

The downtown's major east-west thoroughfare is Bridge Street (U. S Route 33/State Route 161); it is also one of the primary east-west bridge crossings on a major route to/from Columbus. From the City and HDBA perspectives, bridge traffic congestion compounds their downtown traffic challenges. Improving circulation, traffic back-ups, and parking access require ongoing attention by both partners and a cooperative relationship with Ohio's Department of Transportation (ODOT).

Dublin's limited downtown footprint provides few opportunities for expanding commercial square footage. Some historic homes on downtown's periphery have been converted to retail or service uses. New residential development represents the best long-term option for downtown growth, according to City staff. Downtown's eastern boundary is the Scioto River, with green space to the north, established residential to the south, and the City cemetery and strip development to the west. Within the downtown district, the most prominent institutional use is the public library. The City indicates that a more suitable library location exists within Dublin, though any move is not yet under consideration. The City envisions additional residential density at the library site to provide more pedestrian traffic for downtown. Residential development along the Scioto River, assuming the acquisition and assembly of suitable sites, also present opportunities for increased density and pedestrian access to the downtown.

Maintaining downtown's vintage buildings remains a challenge and is viewed as an important component of supporting the district's overall cleanliness and physical appearance. The City of Dublin and HDBA work to address real estate reinvestment issues. Both entities have ongoing contact with downtown's property owners; many are long-term owners with no intention of selling their properties. Their joint work in identifying prospective tenants for downtown's available spaces has supplemented property owner leasing efforts, has strengthened the ground floor mix, and has helped improve multiple downtown buildings and their lease space.

Successes/Best Practices

Dublin's restaurant cluster draws regionally, particularly on weekends. The City and HDBA work closely with restaurant owners and their marketing partners to actively promote this cluster. In turn, 100% of downtown's restaurateurs participate in downtown's food-oriented events, including the annual Great Chili Cook-Off. (Similar efforts for other business clusters are incorporated into downtown's event schedule.)

Both partners also attribute downtown's success to their ongoing work to enforce downtown-specific design guidelines and regulations to maintain downtown's unique character. The HDBA and the City emphasize ongoing education in presenting downtown's guidelines, processes and regulatory framework. They work to ensure that information is accurate and available to new businesses through multiple sources and media. In addition to accurate and available information, the partners work to ensure that Dublin's approval and review processes are regular and readily understood. In these efforts, the City and HDBA share three (3) goals: providing direction to local entrepreneurs, increasing sales, and strengthening the overall mix, including the mix's retail component.

Both partners describe the nature of their partnership as "very practical." Dublin's downtown is located in a highly competitive market proximate to some of Columbus' wealthiest areas and most successful shopping and dining districts. By communicating and sharing resources, they work to keep the community engaged with its downtown. Both partners feel that the community supports the downtown and wants the downtown to succeed.

Finally, Dublin's first downtown in-fill development, described above, included downtown parking provisions as part of the development agreement. The developer donated the improved rear surface parking lot for public parking to the City of Dublin. In return, the City granted a waiver and variance from existing parking requirements. The City also owns and maintains this same lot. In other downtown locations, the City has used Tax Increment Financing (TIF) funds for physical improvements. For downtown's additional in-fill development, the City issued a Request for Proposal (RFP) for City-owned land. The City granted a long-term ground lease for the site as part of the development and granted certain variances to ensure the inclusion of a public plaza that the City continues to maintain and jointly programs with its downtown partners.

Worthington, Ohio

Current Conditions

Worthington's traditional downtown is located at the intersection of two major Columbus routes, High Street and State Route 161. The downtown area is also located about 1.5 miles from the Shops of Worthington, a 175,000 SF shopping mall at High Street and I-270. Olde Worthington, as downtown is known, physically reflects its history—most buildings have zero frontages. Worthington's downtown currently has several signature businesses, including a destination jeweler, a large independent hardware store, and the historic Worthington Inn. Each of these two High Street commercial districts serve different target markets.

The City's current economic development efforts are focused on traditional workforce development and corporate recruitment. City staff wants greater private sector engagement in improving downtown, given limited City resources. Local officials continue to encourage a renewed downtown focus among the likely partners. Worthington's downtown is viewed as the City's 'place maker,' defining the community's image and market position for overall economic development. The City is also working to modify and extend its existing economic incentives for use by downtown's business and property owners. Part of the impetus for the City's partner outreach and incentive modification is work to improve tenancies and the downtown's current 8.6% vacancy rate.

Challenges

Downtown Worthington's merchant organization, the Olde Worthington Business Association (OWBA), has struggled in recent years. OWBA has few members and no programming. At the urging of City staff, OWBA has been working with Heritage Ohio for the last three (3) years to create a Main Street organization to focus on Worthington's traditional downtown. Local concerns exist about the long-term viability of any organization tasked with managing Worthington's downtown. These concerns include:

- OWBA's membership has significant overlap with the Shops of Worthington, resulting in less focus on downtown-specific issues;
- Downtown's stakeholders, including OWBA, the Chamber, the Convention and Visitors Bureau, and the nearby residents association, view each other as competitors versus as partners in strengthening downtown for the community;
- Downtown planning work has not been a priority to establish a local vision for downtown's future.

Successes/Best Practices

Downtown's location and traffic ensure continued leasing interest by independent businesses and franchisees. According to City staff, downtown's leasing market is very strong with lower PSF rents and pass-throughs when compared with other Columbus 'hot' districts, such as the Short North and areas near Easton, Columbus' major lifestyle center. To maintain downtown's retail character, the City has worked with local property owners to identify the most suitable locations for office, retail, and service uses, ensuring that lease spaces with the best retail attributes remain retailer occupied.

Worthington's downtown also has two key opportunities for the rehabilitation of two large historic properties to support the overall downtown business mix. Both projects will likely use federal and state (historic) rehabilitation tax credits as a key component of project financing.

Pewaukee, Wisconsin

Current Conditions

Pewaukee's downtown functions as both a Milwaukee suburb and an established lake resort. For most of downtown's businesses, the result is seasonality. Downtown's businesses survived seasonal changes and the recent economic downtown by adapting. Positively Pewaukee (PP), the downtown (Main Street) organization, indicates that downtown's business owners willing to try either new or unusual products or marketing tactics are the most successful. One example was a gift shop owner who constantly monitors store merchandise, price points, and customer responses. This owner sees 100 customers on a slow day and 400 during high season. Downtown's retailers have also changed their expectations as a result of the recession. According to PP, their successful owners are focused on extending their customers' relationships with their businesses.

Despite downtown's seasonal business nature, the current vacancy rate is about 3%, consisting of two (2) vacant storefronts. PP continues to emphasize business retention in their overall business development work. The organization also spends significant time working with property owners to improve lease space and with local officials on emerging in-fill development opportunities for several downtown sites that could improve connectivity between downtown, Lake Pewaukee, and the Pewaukee River.

Challenges

PP's biggest challenge is Pewaukee's political division. The Village of Pewaukee was incorporated in 1876 within the Town of Pewaukee. Much later, the Town officially incorporated as the City of Pewaukee. The City actually surrounds the Village of Pewaukee, and Pewaukee's downtown is physically located in the Village. According to PP, the relationship between these two jurisdictions is very dysfunctional. The Village/City distinction is meaningless to residents and visitors and is fueled only by political expediency. Significant dollars have been expended for studies considering a merger between the two governments, but nothing has been accomplished. PP's stance is that downtown serves the Pewaukee community, and they avoid involvement in these ongoing intergovernmental squabbles.

From a development perspective, downtown Pewaukee has one major undeveloped parcel with developer interest. This parcel was part of a proposed 2007 condominium project. During the recession, this parcel went into foreclosure and is currently bank owned. The Village and PP are working with a prospective buyer, but the bank is unwilling to sell, given outstanding debt. While PP and Village staff are trying to put together an acceptable financial deal for the parcel's sale, concerns exist about whether local officials have a real understanding of the development cycle and the need for process certainty.

Successes/Best Practices

PP believes that their emphasis on Pewaukee as 'one community' continues to create a strong local affinity for the downtown district, its businesses, and its events. The organization works to educate local officials about what downtown needs from a business and physical development perspective. One program that has proved both educational for local officials and resulted in better communications with downtown businesses is the Downtown Working Group. This group has been organized around either issues of concern or conflict with the Village. This group meets monthly to work on specific issues, and all businesses are invited. Merchant members are involved in the group based upon their individual concerns. Three current issues being addressed are train noise from downtown's rail traffic; crosswalk safety on the commercial streets with access to Lake Pewaukee; and connectivity to the businesses from a new downtown parking lot. Working in partnership on these issues has helped Village officials and downtown's businesses to hear each other's concerns and to gain mutual knowledge in balancing overall downtown concerns. For example, with the rail traffic concerns, merchants wanted a 'no whistle' zone in the downtown district. Merchants learned about the process complexity and costs required to get the zone in place. Together, potential grant funding was obtained to use for the 'no whistle' zone process. This same approach has been used to improve overall pedestrian connectivity and safety throughout the downtown.

Business retention activities are one of PP's strengths and represent another aspect of the organization's merchant outreach. PP has positioned itself as a resource for downtown's businesses. While downtown's businesses are generally experienced with seasonality, the recent recession and a 2008 flood greatly affected many downtown businesses. Owners approach PP about their business-specific problems, and PP, over time, has identified regional technical or business support services accessible to downtown's owners. No incentive programs have been offered in the Village for nearly a decade, and downtown's businesses haven't requested the development any new incentive programs.

PP also works continuously with downtown's property owners to enhance the quality of the area's lease space and building stock. Most buildings characterized as being in good condition, but several problem properties exist. Four (4) owners of properties needing improvements are elderly, and PP is working with the ownership and local brokers to find suitable buyers.

Success Transfer Elements for Zionsville

The efforts in each peer community encompass five (5) themes for the Town's future efforts to improve and sustain an economically vital downtown Zionsville. These themes apply to downtown Zionsville's issues and opportunities and include:

- Collaboration and Partnerships. Each peer community is focused on the future of their special downtown. Whether a formal downtown management structure, a dedicated municipal staff member, or a merchant organization, the major downtown stakeholders in each peer community look beyond self-interest, personal agendas, or past perceived slights to work in tandem to ensure a strong downtown. Working together on individual or multiple projects or issues over time is simply how revitalization work gets done and how growth occurs. For Zionsville, collaboration with many partners will be key to the Village's future strength and ultimately to successful economic growth throughout the community.
- Downtown Advocate: Related to the above is the need for a local entity to assume the lead in addressing downtown Zionsville's issues, formulating programs that promote the downtown, and works to facilitate business growth. This downtown advocate should be acknowledged as the lead by downtown stakeholders.
- Business Growth and Support. Each peer community recognizes that their street level businesses serve to differentiate their downtown from other nearby shopping and dining areas and often attract customers from outside of the community. Efforts to strengthen these ground level businesses and the overall downtown mix encompass four (4) sets of activities: entrepreneurial

growth, retention of and expansion by existing district businesses, new locations for established area businesses, and business support. Being located 'on the bricks' continues to appeal to established retailers and retail entrepreneurs from the Indianapolis area. Partnering with entrepreneurship programming from the region can provide resources for existing downtown business owners. In turn, those same programs can identify potentially successful new business concepts suitable for downtown Zionsville. Local actions, such as the application of incentives, can help facilitate new concepts by downtown Zionsville's successful business owners and enhance the interest and opportunities in downtown lease space or properties.

- Ongoing Promotion. Each of the peer communities uses a balanced schedule of special events, retail/business promotions, and image building actions to constantly reinforce their downtown market position. The Boone County Convention and Visitors Bureau heavily promote downtown's current special events. The survey results from this study indicate that both residents and visitors patronize Village businesses. Additional image building and targeted retail or business cluster promotions can continuously educate locals and the region about downtown Zionsville's business offering. These additions can mitigate concerns expressed by downtown Zionsville businesses about street closures. Zionsville's downtown businesses must recognize that larger special events or festivals are not organized to generate direct sales in individual businesses. They provide increased visibility for all businesses to a broader group of potential customers. Ongoing promotions also require periodic, typically annual, evaluation to assess whether that promotion continues to achieve its attraction objectives. These routine evaluations use five (5) general categories of measurements: attendance, attitudes of attendees, participants and/or affected businesses, event logistics, value generated for event sponsors, and if a retail/business promotion, the business sales generated during the event.
- The Role of Downtown Businesses. Active merchant engagement is an important component of each peer downtown's most successful work. This encompasses ongoing personal interaction with business and property owners, merchant involvement in certain events, and understanding attitudes from routine survey data. This kind of engagement assumes that downtown's successful businesses learn and understand their role in downtown's success. Regardless of the organizational or operating structure, promoting the downtown district itself is the role of any downtown's lead group or agency. The role of individual downtown business owners is to actively promote their businesses to their current and prospective customers. By doing so, they enhance downtown's cumulative attraction power. It is not the role of the downtown lead organization, any downtown partner, or municipal government to 'bring' customers to any downtown business or business cluster.

BUSINESS MIX ANALYSIS

The Village's current mix of businesses is shown in **Figure 3** and **Table 8** below. This mix analysis uses a list of downtown businesses provided by the Zionsville Chamber of Commerce and downtown business and personal property tax and real estate data developed by Town of Zionsville staff as of year-end 2013.

The combined data was subsequently reviewed with staff from the Chamber and the Town to resolve any inconsistencies.

Figure 3. Downtown Zionsville Business Mix by Percentage

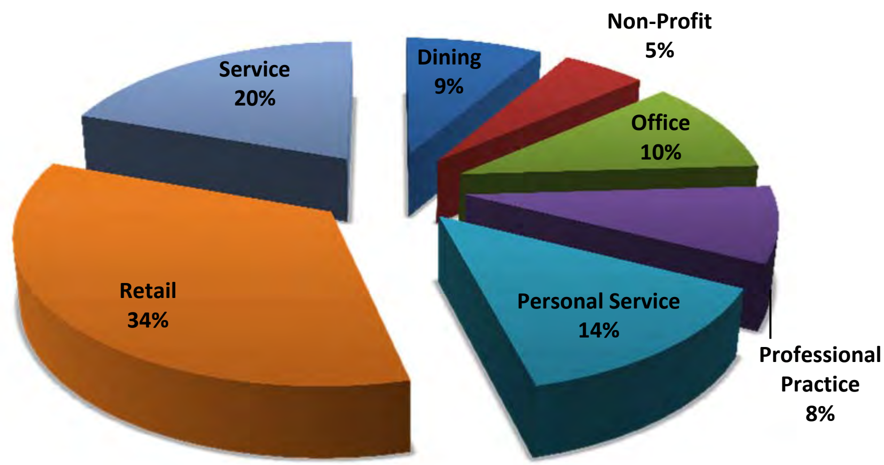


Table 8. Downtown Zionsville Business Mix by Use Type

Category	Number of Uses
Dining	13
Non-Profit	8
Office	16
Professional Practice	13
Personal Service	21
Retail	53
Service	30
TOTAL	154

Sources: Town of Zionsville; Zionsville Chamber; BDI.

Downtown Zionsville's business mix represents the diversity of retail, service, and office uses typical of a traditional downtown area. Overall, the percentage of dining, or food and beverage, businesses are lower at 9% than many downtowns. BDI's downtown work indicates that the food and beverage category generally averages 15-25% of any downtown's offering and is lower or higher, based upon downtown market attributes, such as employee numbers. The Village's retail component is a strong at 34.4%. The personal services category, including businesses such as spas and hair salons, is 14%.

Using the Town's real estate data (see **Table 9** below), the Village has an estimated 338,000 SF of occupied ground level with about 7,000 SF currently vacant. (This vacancy number excludes the Carter building.) The average unit size is approximately 2,200 SF. The Village Business District zoning classification currently excludes uses exceeding 5,000 SF. With development on South Main Street, the study area can now accommodate certain auto-oriented uses with slightly larger footprints. The businesses envisioned for this area will not be large format.

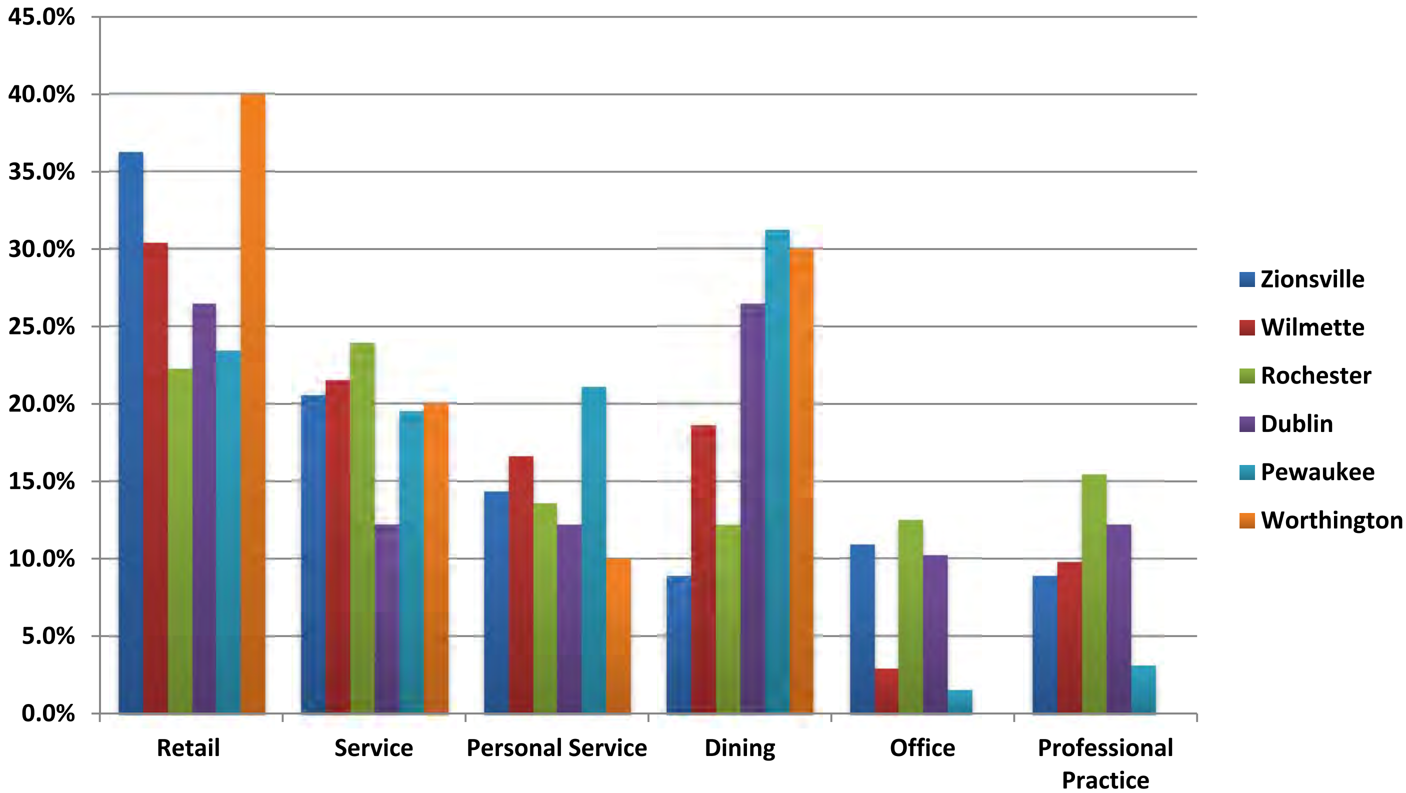
Table 9. Real Estate Data

Downtown Occupancy Estimates	Floor Area (sf)
Total	443,021
Ground Floor	345,404
Vacant*	6,998
Occupied	338,406
Average Unit Size	2,195
Vacancy Rate	2.03%

Sources: Town of Zionsville, BDI.

Zionsville's downtown uses and those in each peer community's downtown were also compared as part of the peer assessment. The results are shown in **Figure 4** below. With the exception of Worthington, the most recent downtown business lists, identifying ground floor businesses, was obtained from either the peer community's downtown organization or from municipal staff. City staff estimated Worthington's percentages by use; no current list of ground floor businesses was available.

Figure 4. Ground Floor Mix Comparison in Peer Communities



Among the peers (excluding Worthington), three (3) points are notable: (1) Zionsville has the largest concentration of retailers in its downtown district (34%), with most peers in the 20-30% range; (2) Zionsville's dining cluster is significantly smaller than those of the remaining peers; (3) Downtown Zionsville's percentages of service and office-related uses are generally comparable with the peer downtowns.

MARKET SHARE ANALYSIS

Any community's residents often associate their downtown with those uses that cater to their routine consumer needs. These same residents typically identify with their downtown as a gathering place and with what the district transmits to others about their community. New development formats, emerging retail categories, and consumer trends and behaviors have altered what constitutes economically viable downtown uses over time. Consequently, businesses and business categories that thrive in a downtown environment have also changed to respond to new or emerging market conditions. Downtown's businesses today are collectively important, not only because of their power to either enhance or impair the community's image within a region, but because these businesses must attract both residents and visitors to compete and provide an acceptable return on the owner's business investment. Most downtown environments also foster and support the growth of small and unique businesses and concepts. The resulting interesting mix of businesses represents an ongoing competitive advantage that must be sustained, managed, and programmed strategically.

This market share analysis applies information about downtown Zionsville's current business mix and examines the market shares for existing business categories and for certain categories of businesses identified in Zionsville's consumer survey results. Downtown Zionsville's existing conditions indicate what is working and where opportunities exist to affect the mix of uses over time. Understanding these existing conditions and combining that data with regional retail sales performance indicate ways to improve downtown's retail and restaurant components--by increasing sales in existing businesses, or business categories, by attracting new businesses that respond to changing consumer behaviors, and by enhancing the Village's overall attraction power.

Calculating market share, or the portion of total available sales earned by any individual business or cluster of similar businesses, reveals how much potential exists to grow downtown's businesses by capturing additional sales. Understanding market share reveals the relative competitiveness of the downtown offering within any business category and permits a comparison of offerings in different business categories. In contrast, retail sales leakage is an economic calculation of supply and demand, or spending power versus retail sales. It represents the amounts that any community, or a defined geography, spends outside of that community in multiple broad retail or store categories. Leakage does not estimate what is actually being captured or indicate if a particular leakage category represents a strategic growth opportunity. A market share calculation is strategic. It examines the percentage of the total market being served by the commercial area's existing retailers, personal service businesses, or restaurants. Market share analysis reveals potential growth opportunities and strategies, including downtown Zionsville's specific business opportunity profiles and action plans, provided in subsequent sections of this study.

MARKET SHARE METHODOLOGY

Using the list of existing ground floor businesses and footprints described in the Business Mix section, estimates of the Village's sales by business and business category were developed. These estimates used the sales PSF suggested by these sources: retail and commercial brokers operating in the Indianapolis region, the Urban Land Institute's (ULI's) retail sales per square foot for the actual or most similar business category (as published in ULI's *Dollars and Cents of Shopping Centers 2008*), and specific sales PSF information obtained in the interviews conducted during this study. The resulting sales PSF estimates were then multiplied by the square footage, or footprint, occupied by each Village business. The result was an estimate of annual sales for each downtown business.

These annual sales estimates were totaled by business category, and then, compared with the retail sales potential for each market. The retail sales available to any business are limited by the category-related purchasing power for residents in each market. (This can sometimes be modified by purchasing power from nearby attractions or an employment center.) This retail sales potential data originates from Alteryx. (Alteryx is BDI's data source for demographics shown throughout this report.) Alteryx uses data from Experian's credit division to project total retail spending. Purchasing information for residents of specific geographies and for areas with similar demographic characteristics is anonymously consolidated to estimate any population's retail spending power. The purchasing information may be sourced from many communities, as residents make selections based upon satisfaction with products and services offered by area businesses.

The final calculation of market share is straightforward. For example, if a downtown's estimated sales of children's apparel are $500,000 and the residents of that community spend $2,000,000 on children's apparel; then, the resulting market share for children's apparel is $500,000/$2,000,000, or 25%. The annual sales estimates, calculated as described above, were compared with Zionsville's retail spending power in those same business categories to calculate specific capture rates. Comparing estimated sales and category spending power by markets are the basis for creating an accurate template for understanding of market share and are indicative in developing strategies to sustain and increase capture rates within those categories.

LOGICAL MARKETS

For the purposes of analyzing market share, two (2) Village markets were considered:

- Affiliated Market: This market includes Zionsville residents choosing to support businesses located in the Village and who identify strongly with the community and its businesses.
- Destination Market: The population living within 15 minutes who can routinely and readily travel to downtown Zionsville for distinctive shopping and dining.

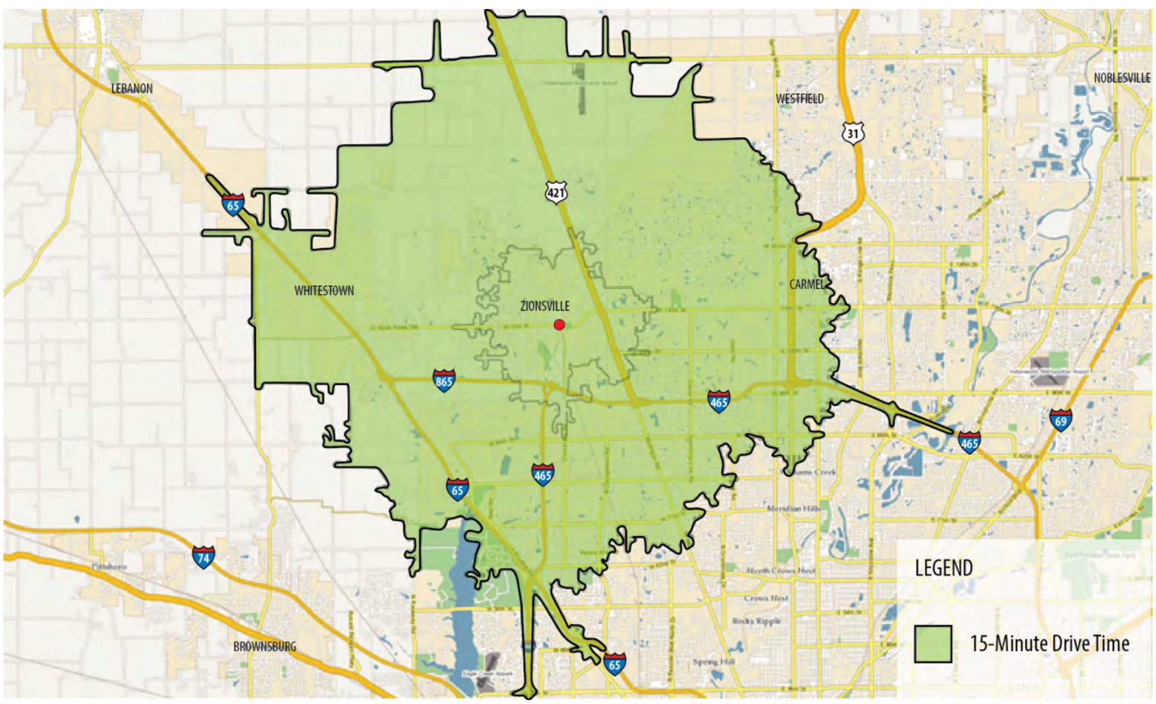
For reference purposes, the demographics for these two (2) markets are shown again below in **Table 10**. A map of the 15-minute drive time also follows as **Figure 5**. In selecting these two (2) markets to establish market share goals, increasing the market capture rate within the Affiliated Market will enhance the Village's profile among all Zionsville residents, given recent annexations, and acknowledge the importance of the local market to Village and study area businesses. The destination market capture goals recognize the Village's market position as Boone County's primary attraction and the established destination character of multiple Village and study area businesses.

Table 10. Reference Demographics

Category	Town of Zionsville	15 Minutes	Indianapolis MSA
Total Population	24,159	126,231	1,818,674
Population Density (per Sq. Mi.)	930.13	931.24	475.75
Median Age	39.6	36.3	35.7
Employees	10,522	99,711	793,207
Jobs Per Household	1.3	1.2	1.1
% Bachelor's Degree or Greater	67.3%	53.2%	31.10%
Average Household Income	$143,469	$109,334	$73,662
Median Household Income	$101,712	$69,620	$52,704
Per Capita Income	$50,768	$43,019	$28,784
Estimated Consumer Expenditures	$246,422,014	$1,392,926,386	$16,730,257,622

© 2013, by Experian, © 2013 Alteryx, Inc., BDI; U. S Census Bureau American Community Survey 2012; city-data.com: BDI.

Figure 5. 15-Minute Drive Time



MARKET SHARE BY BUSINESS CATEGORY

Seven (7) business categories, given the existing number of Village businesses and the sales estimates, were examined to consider the Village's market share in the Affiliated and Destination markets. The categories and market share capture rates are in **Table 9** below. (The dollars shown in Total Retail Demand are not the sum of the sales and spending power for the preceding seven business categories listed.)

Table 11. Market Share Capture Rate by Category

Category	Estimated Village Sales	Zionsville Spending Power	Capture Rate	15-Minute Market Retail Demand	Capture Rate
Eating and Drinking	$10,287,691	$26,295,574	39.1%	$145,646,757	7.1%
Specialty Foods	$3,285,741	$1,155,583	284.3%	$6,711,117	49.0%
Home Accessories	$3,007,685	$1,591,957	188.9%	$8,330,757	36.1%
Women's Apparel	$1,511,224	$1,729,334	87.4%	$9,975,376	15.1%
Antiques and Galleries	$1,740,361	$379,807	458.2%	$2,170,374	80.2%
Jewelry	$2,527,528	$614,156	411.5%	$3,498,140	72.3%
Hair and Nail Salons and Spas	$1,779,186	$339,402	524.2%	$1,853,803	96.0%
Total Retail Demand	$21,935,575	$246,422,014	8.9%	$1,392,926,386	1.6%

Source: © 2014 Alteryx, Inc., Town of Zionsville, BDI.

As noted in the Methodology section, the capture rate, or percentage of market share, is a basic percentage calculation. The Village's market shares in five (5) of the seven (7) business categories are significant and reflect the quality of certain Village business clusters and Zionsville's market strengths. Overall, these five (5) categories represent successes and opportunities. These five (5) categories capture significantly more sales than the retail spending potential for Zionsville's residents in those same categories. Again, this supports this study's consumer survey results, indicating that residents are active users of downtown Zionsville. These same categories are also capturing significant sales from the 15-minute destination drive time.

Table 12. Unique Retail

Category	Unique	Total GF	%
Unique/Specialty Retail Sales	$4,536,976	$21,935,575	20.7%
Unique/Specialty Retail Businesses	20	53	37.7%

Sources: Town of Zionsville, Zionsville Chamber of Commerce, BDI.

The Village's unique and specialty retailers are shown in Table 12. The twenty (20) individual businesses included in this category do not readily fit within the seven (7) business categories. These businesses comprise 38% of the mix numbers and represent nearly 21% of the Village's estimated sales. The percentage differences reflect their generally smaller business footprints. This category, consisting of unique businesses with diverse customers, serves to differentiate the Village from other downtown environments.

Ultimately, these successful categories and unique businesses represent opportunities for increased business growth, either through retention, owner expansions or new concepts, or new recruitment. These opportunities build upon the Village and study area's most successful businesses and uses. From a retail and restaurant perspective, downtown markets are challenging, forcing businesses to adopt best operating practices, or fail. Zionsville's downtown area is also part of a highly competitive regional environment for all uses, and downtown's businesses provide the foundation for future attraction.

MARKET SHARE OPPORTUNITIES

Using the categories identified in this Market Share Analysis, this Opportunity section classifies each business category by market share and establishes sales goals by business category for the Village and an overall sales goal for the study area. Estimated sales performance PSF within the Village business categories is then applied to the sales goals to estimate the additional number of business units and SF to achieve those goals. This analysis also identifies potential recruitment targets, according to the consumer survey results, likely to improve commercial activity throughout downtown Zionsville. The strategic implications are also noted.

In over twenty years working with commercial districts, BDI has observed that the most vital downtowns and commercial areas command a significant share of spending power because residents and visitors identify with and seek out those areas. This level of affinity can be particularly strong in communities, like Zionsville, with attractive markets, engaged residents, and a 'known' downtown. In comparing the study area's markets and formulating market-specific strategies, the strength of the Village's overall market shares can be measured by these classifications:

- Regional Draw: A 150% or greater market share, indicating that this category draws from a larger geography than the Town.
- Community Serving: A 75% to 149% market share that includes the 100% level, illustrating balance between estimated sales and spending power. This range recognizes that this match will be perceived before the balance occurs and continue as regional consumers increasingly access that business category.
- Competitive Alternative: A 25% to 74% market share, recognizing strong regional retail attraction(s) nearby, but the Village can be a shopping choice because it is convenient and/or unique.
- Minor Alternative: Less than a 25% market share, occurring when the overall category is declining, or there is a weak location or fit between the use and certain aspects of its location(s).

The Village's Market Share Classifications, based upon capture rates, or market shares, are shown in **Table 13** below. (The Total Retail Demand, shown in Table 13, is not the sum of the retail demand categories shown.)

Table 13. Market Share Classifications

Category	Estimated Village Sales	Zionsville Spending Power	Zionsville Market Share	Zionsville Market Share Classification	15-Minute Market Retail Demand	15-Minute Market Share	15 Minute Market Share Classification
Eating and Drinking	$10,287,691	$26,295,574	39.1%	Competitive Alternative	$145,646,757	7.1%	Minor Alternative
Specialty Foods	$3,285,741	$1,155,583	284.3%	Regional Draw	$6,711,117	49.0%	Competitive Alternative
Home Accessories	$3,007,685	$1,591,957	188.9%	Regional Draw	$8,330,757	36.1%	Competitive Alternative
Women's Apparel	$1,511,224	$1,729,334	87.4%	Community Serving	$9,975,376	15.1%	Minor Alternative
Antiques and Galleries	$1,740,361	$379,807	458.2%	Regional Draw	$2,170,374	80.2%	Community Serving
Jewelry	$2,527,528	$614,156	411.5%	Regional Draw	$3,498,140	72.3%	Community Serving
Hair and Nail Salons and Spas	$1,779,186	$339,402	524.2%	Regional Draw	$1,853,803	96.0%	Community Serving
Total Retail Demand	$21,935,575	$246,422,014	8.9%	Minor Alternative	$1,392,926,386	1.6%	Minor Alternative

Source: © 2014 Alteryx, Inc., Town of Zionsville, Zionsville Chamber of Commerce, BDI.

The strongest five (5) categories—Antiques and Galleries, Specialty Foods, Home Accessories, Jewelry and Salons and Spas—can be classified as Regional Draws within the Zionsville market. Three (3) of these categories (Antiques and Galleries, Jewelry, and Salons and Spas) also have an estimated market capture exceeding 70% within the 15-minute destination market. These three (3) categories have a strong presence in Zionsville's downtown, with estimated capture rates exceeding 70% of their category's retail demand within the destination market. The two (2) remaining categories within this group of five (5) represent an additional opportunity to capture sales within the destination market by attracting new customers and increasing visits to the Village and study area.

For many vintage downtowns, the Eating and Drinking category has been an instrumental component of their attraction power. Trends suggest that dining will remain an important opportunity and ongoing competitive advantage for downtowns, particularly given the emerging consumer desire for an original 'experience.' For Zionsville, the consumer survey results indicate respondents' preferences for varied dining options, formats and price points, including venues with entertainment after dining out. Through sales and unit growth, the Village and study area can increase food and beverage options and sales and enable current owners to consider new dining concepts.

A second key business category is women's apparel. Frankly, the Village contains the strongest women's apparel cluster in a traditional downtown, regardless of size, identified to date by BDI. The owners have strong operating, marketing, and merchandising skills. Two (2) additional stores have joined this cluster during this market study timeframe. The strength of this cluster also represents an important opportunity for destination market sales growth and for joint, cluster, and Village promotions.

Table 14. Market Share Goal (Village)

Category	Estimated Village Sales	Desired Village Sales	New Sales	Target Sales PSF	SF for Desired Sales	Estimated # Businesses	Desired Market Share
Eating and Drinking	$10,287,691	$13,147,787	$2,860,096	$225	12,712	3	Competitive Alternative
Specialty Foods	$3,285,741	$3,624,003	$338,262	$200	1,691	1	Competitive Alternative
Home Accessories	$3,007,685	$3,332,303	$324,618	$195	1,665	1	Competitive Alternative
Women's Apparel	$1,511,224	$1,729,334	$218,110	$200	1,091	1	Community Serving
			$3,741,086		17,158	6	
Existing Vacancies*					6,998		
Net SF					10,160		

Source: © 2014 Alteryx, Inc., Town of Zionsville, Zionsville Chamber of Commerce, BDI.

One additional category represents an important business opportunity for downtown Zionsville—retailers selling goods and providing services within the broader category of active living or recreation. Linking nearby bike and pedestrian trails to the study area enhance the visibility of the business offering to trail users. In Zionsville's survey results (Question 9), respondents identified 18 individual businesses within this broad business category. No current businesses within this category are part of downtown's business mix. A Village location would be unsuitable for the six (6) format businesses patronized, such as footlocker, REI or L.L. Bean. Respondents did identify the following 12 businesses within the region that could consider a downtown Zionsville location.

- A1 Cyclery
- Athletic Annex
- Bicycle Garage Indy
- Bike Line (Carmel and Broad Ripple)
- Carmel Cyclery
- Cycle Outfitters
- Gears Up Cyclery (Plainfield)
- Indy UpCycle (Broad Ripple)
- Matthews Bicycle Shop
- Nebo Ridge Bicycles
- Performance Bicycles
- Runner's Forum

Table 15. Market Share Goal (Study Area)

Market Share Goal: Downtown Study Area	
Total Retail Sales	$246,422,014
Desired 13% of Total Retail Sales	$32,034,862
Current Total Retail Sales	$21,935,575
New Sales	$10,099,287
Estimated Additional SF	50,496 sf
Village Net SF	10,160 sf
Net Additional SF	40,336 sf

Source: © 2014 Alteryx, Inc., Town of Zionsville, Zionsville Chamber of Commerce, BDI.

The overall market share goal for the study area is to capture 13% of Zionsville's retail spending power versus the current 8.9%. This same goal will also increase the overall capture rate in the 15-minute destination market from 1.6% to 2.3%. Applying sales goals to the four (4) most opportune business categories, these sales increases translate into a modest 10,160 net SF of additional retail space in the Village and 40,336 net SF elsewhere in the study area. In addition to supporting incremental business revenue growth, the addition of this modest amount of available space in the study area will enable retailers, restaurants, and small office users requiring on-site parking to locate near the Village and to complement the Village's strong business clusters.

BUSINESS OPPORTUNITY PROFILES

The four (4) opportunity categories with identified sales goals are shown in **Tables 16 to 19** below. For Eating and Drinking, the opportunity is to expand their estimated market share within their Zionsville or destination market classification. The Women's Apparel category can increase its destination market position to Community Serving. For Home Accessories and Specialty Foods, increases in sales and square footage (either new or expanded stores) can strengthen these clusters and their attraction power.

Potential recruitment targets, based upon the consumer survey results, are noted for each category. In achieving the study area's sales goals, study area businesses can enhance their operating standards, capitalize on their study area location, and increase their store's local and regional visibility through marketing. The resulting strategic goal for downtown Zionsville is two-fold--to maintain a strong Village core by capitalizing on these identified business opportunities, and by implementing programs and activities that support incremental sales growth for all of downtown's current businesses.

Table 16. Eating and Drinking

Category	Estimated Village Sales	Desired Village Sales	New Sales	Market Share Classification	Zionsville Market Share	
					Current	Goal
Eating and Drinking	$10,287,691	$13,147,787	$2,860,096	Competitive Alternative	39.1%	50%

Source: © 2014 Alteryx, Inc., Town of Zionsville, Zionsville Chamber of Commerce, BDI.

Market Share Goal: Increase sales to 50% of Zionsville's spending power for this category.

Strategy Implications for the Town of Zionsville and its Partners

- Build upon existing cluster by facilitating expansions or new concepts by the Village's current food and beverage business owners.
- Support programming to increase category revenues.
- Consider new formats incorporating entertainment.

Prospective Recruitment Targets/Types

- Regional restaurant groups noted in the survey results, such as Patachou, Hoaglin To Go, Bub's (given its Zionsville location), or multiple Broad Ripple restaurants, to open existing or new concepts.
- Ethnic restaurants.
- Multiple brewpubs, such as Irvington Brewery, 3 Wise Men, or Union Brewing.

Table 17. Specialty Foods

Category	Estimated Village Sales	Desired Village Sales	New Sales	Market Share Classification	15-Minute Market Share	
					Current	Goal
Specialty Foods	$3,285,741	$3,624,003	$338,262	Competitive Alternative	49.0%	54%

Source: © 2014 Alteryx, Inc., Town of Zionsville, Zionsville Chamber of Commerce, BDI.

Market Share Goal: Increase sales to 54% of the 15-minute drive time, or destination, market.

Strategy Implications for the Town of Zionsville and its Partners

- Support programming to increase category revenues.

- Foster entrepreneurship with potential new food-related business owners growing at Zionsville's farmers market.
- Work with existing downtown Zionsville food businesses, such as My Sugar Pie, to establish partnerships with regional entrepreneurial training and development resources.
- As certain businesses in this category expand and/or require production facilities, develop a framework to retain these businesses and any related job creation.

Prospective Recruitment Targets/Types

- Zionsville or regional specialty food purveyors interested in either expansion or new locations, such as Goose the Market and Smoking Goose or The Cheese Shop

Table 18. Home Accessories

Category	Estimated Village Sales	Desired Village Sales	New Sales	Market Share Classification	15-Minute Market Share	
					Current	Goal
Home Accessories	$3,007,685	$3,332,303	$324,618	Competitive Alternative	36.1%	40%

Source: © 2014 Alteryx, Inc., Town of Zionsville, Zionsville Chamber of Commerce, BDI.

Market Share Goal: Increase category sales to 40% of the 15-minute drive time, or destination, market.

Strategy Implications for the Town of Zionsville and its Partners

- Build upon existing cluster through targeted recruitment of survey indicated businesses.
- Encourage expansions or line extensions by current business owners.
- Support programming and joint marketing to increase category revenues

Prospective Recruitment Targets/Types

- Businesses with a similar mix of home décor and gifts, such as The Accent Shop in Indianapolis or Gretel's in West Lafayette, represent suitable recruitment targets. Among the 250 businesses patronized by survey respondents, nearby Tangerine Cards and Gifts on Michigan Road in Carmel was among the most patronized.

Table 19. Women's Apparel

Category	Estimated Village Sales	Desired Village Sales	New Sales	Market Share Classification	Zionsville Market Share	
					Current	Goal
Women's Apparel	$1,511,224	$1,729,334	$218,110	Community Serving	87.4%	100%

Source: © 2014 Alteryx, Inc., Town of Zionsville, Zionsville Chamber of Commerce, BDI.

Market Share Goal: Increase category sales to 100% of the Zionsville market for their category.

Strategy Implications for the Town of Zionsville and its Partners

- Support cluster growth, expansion, and joint promotion.

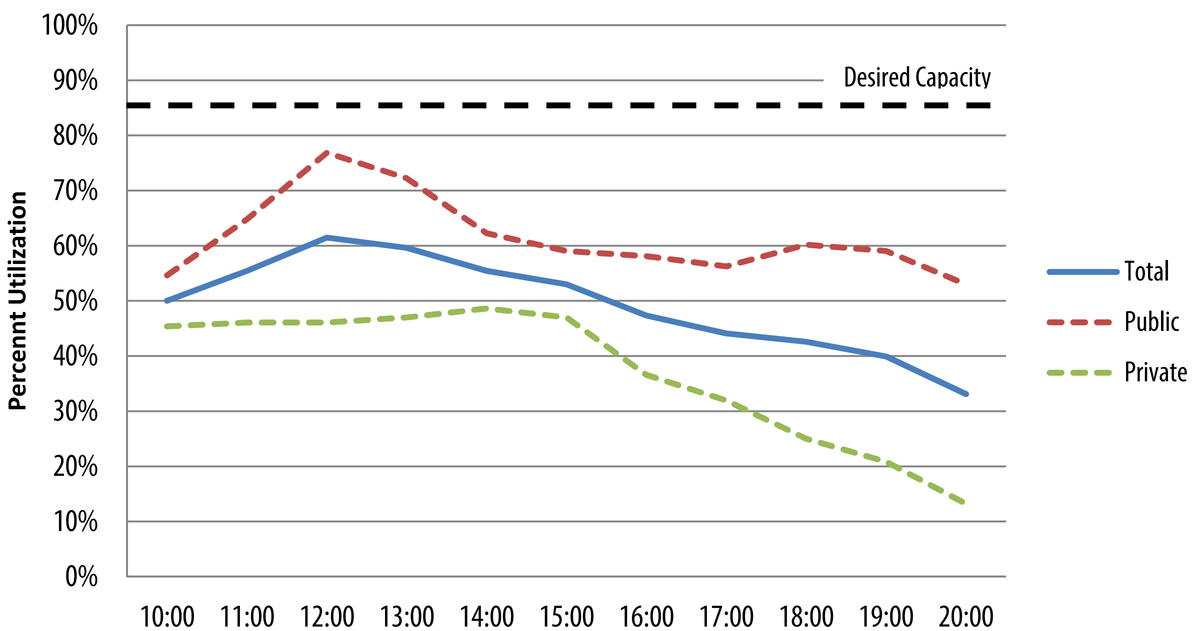
Prospective Recruitment Targets/Types

- During this study, additional target businesses have and are opening in Village locations. Practically, seeking recommendations from existing Village apparel stores for recruitment targets and about programming to strengthen the cluster will generate increased sales.

PARKING UTILIZATION

As previously shown in Tables 4 and 5, the peak hours of combined utilization among public and private parking in the Downtown study area is 12:00 PM-1:00 PM on a weekday and 10:00 AM-11:00 AM on a Saturday. The profiles of weekday and Saturday parking utilization throughout the study area are illustrated in **Figures 6 and 7**.

Figure 6. Downtown Parking Utilization (Weekday[1])



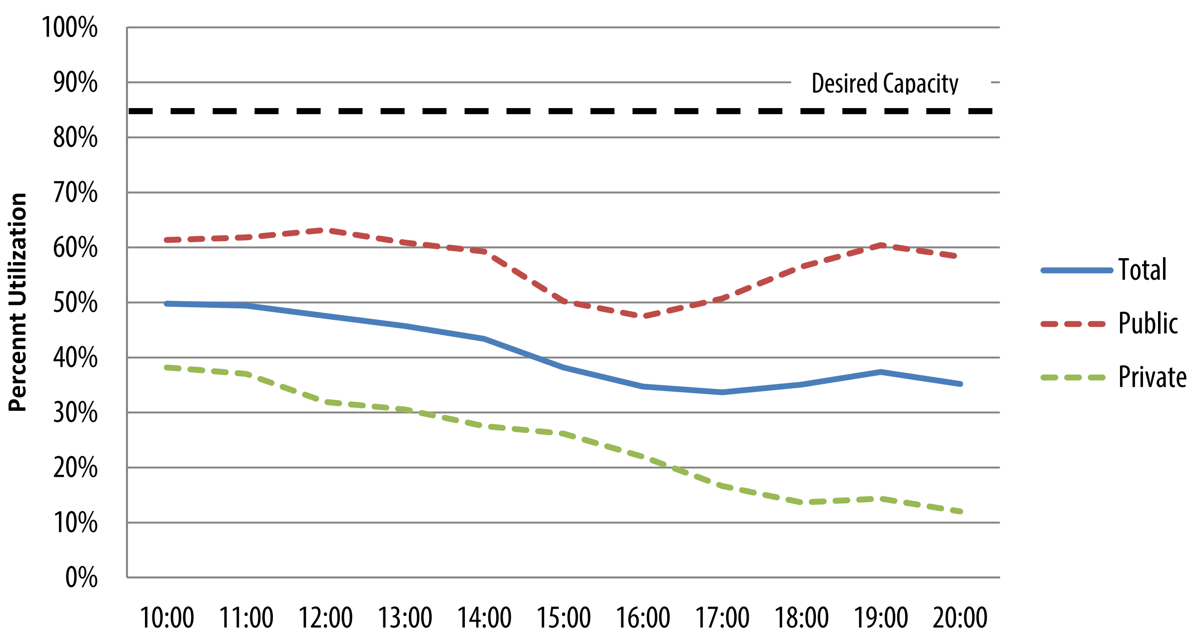
1 - Data collected Thursday, September 12, 2013

Overall, there is currently ample parking supply Downtown to meet the weekday demand; however, not all parking supply is available to everyone looking for spaces. One half of the supply located in the study area is privately owned and either not available to customers or limited only to customers of specific businesses. Further, some Downtown customers may not be able to park exactly where they want (often in front of or along the block of their destination) because their preferred location is fully occupied. However, Downtown Zionsville generally provides a comfortable walking environment and walking a block or two between a parking space and a shop or restaurant is typically not an unreasonable obstacle.

Public parking during the weekday peak hour is almost 80 percent utilized, which from a broad perspective, approaches desirable peak efficiency. Once parking utilization begins to exceed roughly 85 percent, parking begins to become more scarce and inconvenient. While the public parking overall is less than 85 percent occupied, there are a several blocks and public lots that are either at least 75 percent occupied or over 85 percent occupied. **Exhibit 3** illustrates the parking utilization through color-coding for each on-street block face and off-street lot included in the Downtown study area. As presented in the exhibit, public parking along Main Street from Sycamore Street to Cedar Street is highly utilized along with many adjacent side streets and the public parking lots. North of Cedar Street, and one block off Main Street along Elm Street and 1st Street, public on-street parking is underutilized. Most private parking, as shown during the peak hour, is also underutilized.

Much of the weekday peak hour parking can be attributable to restaurant patrons for lunch along with some combination of midday shoppers and employees. After the lunch hour, parking demand steadily decreases overall with use of public parking at approximately 50-60 percent utilization. A slight increase in public parking was observed at 6:00 and 7:00 PM, likely generated by dinner at Downtown restaurants. However, the evening peak use of public parking reached only 60 percent. Occupancy of private parking remains generally even on weekdays (at less than 50 percent utilization) until 3:00 PM when it steadily drops for the remainder of the day.

Figure 7. Downtown Parking Utilization (Saturday[1])



1 - Data collected Saturday, September 14, 2013

Saturday parking utilization is less than a typical weekday with the peak hour (50 percent at 10:00 AM) being 11 percentage points less than the weekday peak hour. During Saturday, the peak hour coincides with the Farmer's Market at the south end of Main Street in the Friendly and Former PNC Parking Lots. Understandably, parking demand is focused towards the southern end of Downtown. Parking utilization remained at similar levels before dipping after lunch in the early afternoon. While utilization of public parking increased to 60 percent for the dinner crowd, in most instances, convenient public parking was generally available throughout the day and evening. As illustrated in **Exhibits 4 and 5** (which depict the block-by-block utilization during to 10:00 AM peak hour and 7:00 PM dinner hour, respectively), when parking was more limited along Main Street at busier times, parking could be easily found within a short

PARKING UTILIZATION
WEEKDAY (12PM - 1 PM)
EXHIBIT 3

TADI

PARKING UTILIZATION
SATURDAY (10AM - 11 AM)
EXHIBIT 4

PARKING UTILIZATION
SATURDAY (7PM - 8 PM)
EXHIBIT 5

distance along most east-west streets and Elm Street. During the evening peak hour of 7:00 PM, parking along much of Main Street between Hawthorne and Cedar Streets as well as 1st Street north of Oak Street and Cedar Street west of Main Street was well utilized. This is easily expected based on their proximity to many of Downtown's restaurants. However, the data and observations indicate that restaurant patrons had little trouble finding convenient public parking space nearby.

PARKING TURNOVER

One chief complaint by many people throughout the study process in terms of parking is that often times, some premium public parking spaces are occupied by business owners and employees throughout much of the day. While parking Downtown does not maintain any posted time restrictions, the parking turnover and duration data along with observations during the counts indicate that several employees do park in desirable spaces for long periods of time.

As previously noted, on-street parking along main Street and a few key side street segments (Hawthorne and Pine Streets between Main Street and 1st Avenue) exhibit turnover of 3.7 vehicles per space, meaning that the surveyed spaces along those blocks were used on average 3.7 times over the course of the 11-hour counts. The average parking duration was 2 hours per vehicle; some parked for considerably longer, but many parked for less. An average two-hour duration is generally appropriate for Downtown visitors to do some shopping and grab lunch or dinner; however, the lack of posted time restrictions allow visitors to feel comfortable taking their time enjoying Downtown without worrying about potentially getting a parking violation.

South of Oak Street, on-street spaces turned over more frequently (4.4 vehicles per space) with less average duration (1.8 hours per vehicle) compared to north of Oak Street (2.9 vehicles per space and 2.3 hours per vehicle). Within the public parking lots (Former Shell Lot and Friendly + Former PNC Lot), the spaces turnover less and experience higher parking durations.

In terms of quantifying how many spaces are occupied by long-term parkers, **Figures 8 to 10** present parking duration profiles for key areas, indicating the number of vehicles parked in hourly durations. As shown in the Figures, a great majority of spaces are occupied for one to three hours. However, between the key on-street and public off-street locations, dozens of spaces are occupied for six hours or more. For purposes of this study, vehicles parked for more than five hours is public parking spaces are assumed to be employees of Downtown businesses. **Table 20** summarizes the number of long-term parkers in key on- and off-street locations. As shown, 59 vehicles were observed parking during the weekday count for six or more hours along Main Street and Pine Street (just west of Main Street) and in the Former Shell and Friendly Lots. Furthermore, within the Former Shell Lot, the spaces utilized for long-term parking where primarily those most convenient for Main Street customers – spaces closest to Main Street.

Figure 8. Parking Duration Profile – Main Street (Weekday)

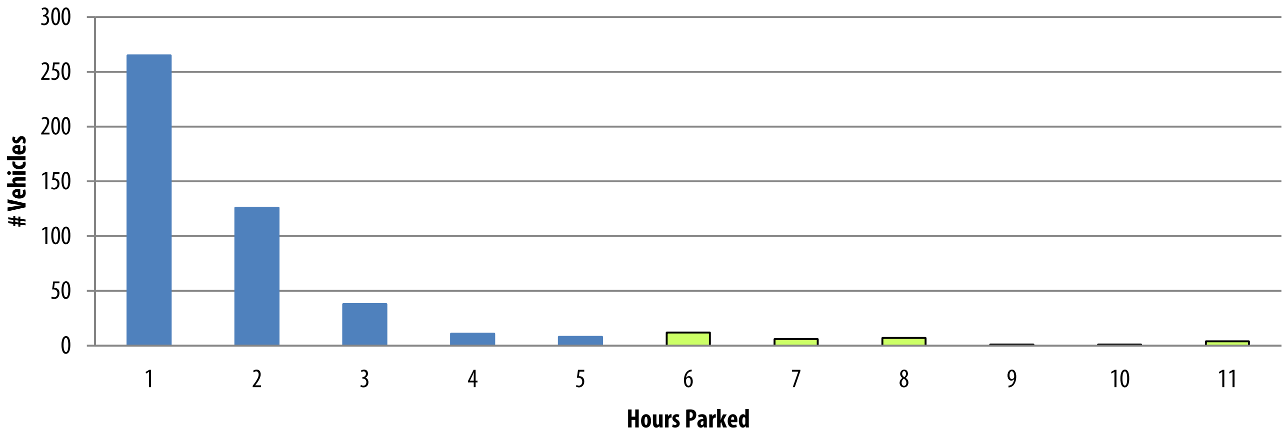


Figure 9. Parking Duration Profile – Former Shell Parking Lot (Weekday)

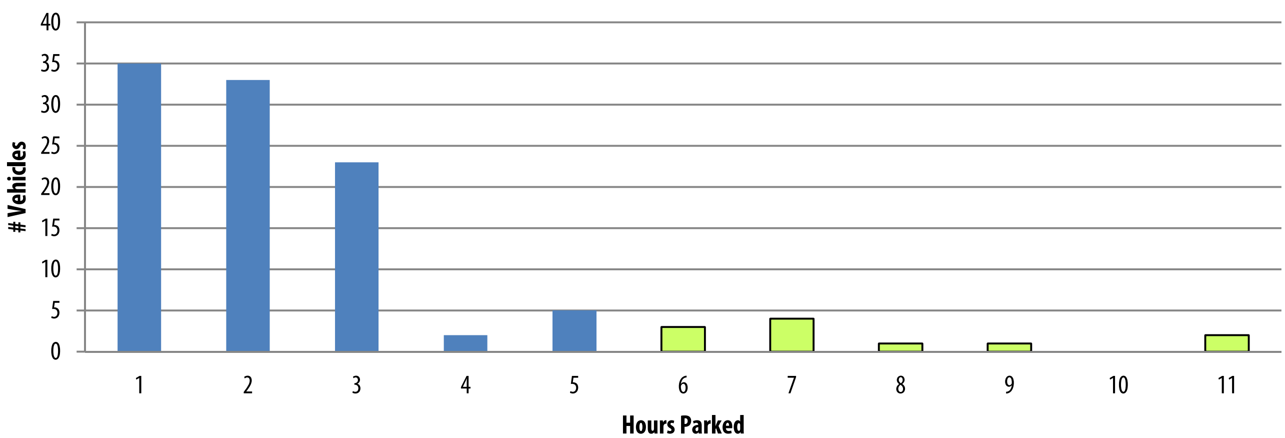


Figure 10. Parking Duration Profile – Friendly Lot (Weekday)

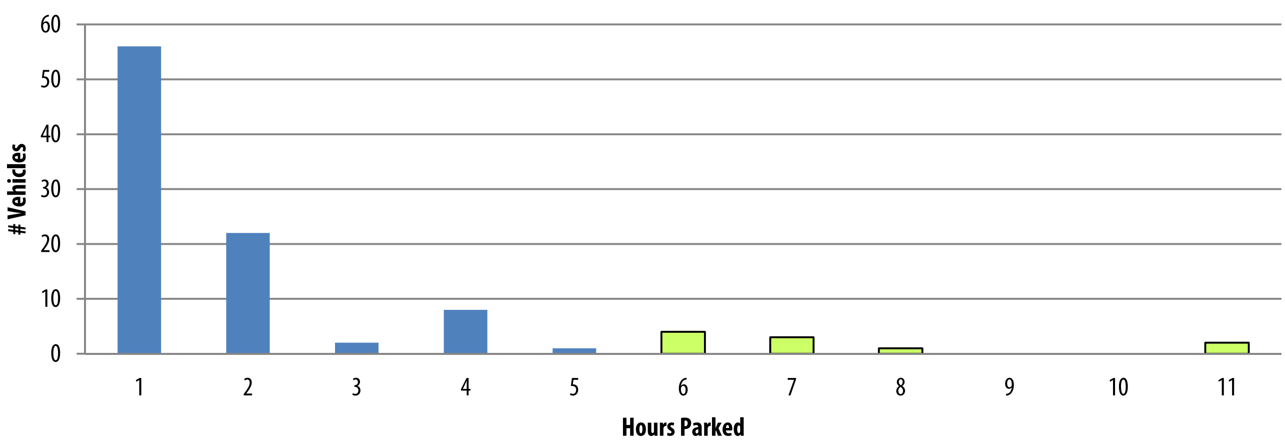


Table 20. Downtown Long-Term Parkers (Weekday)

Location	Vehicles Parked 6+ Hours
On-Street	
Main Street	31
North of Oak Street	*20*
South of Oak Street	*11*
Pine Street[1]	7
Off-Street	
Former Shell Lot	11
Friendly Lot	10
TOTAL	59

1 - Pine Street between Main Street and 1st Street

FUTURE PARKING PROJECTIONS

To estimate a reasonable projection for future parking utilization in the Downtown area, existing parking demand is combined with a projection of parking growth that represents the market share analysis/goals while also incorporating tenant occupancy of currently vacant space Downtown. The first step is to identify an appropriate parking generation rate that reflects the unique characteristics of Downtown Zionsville. Industry resources, such as the Institute of Transportation Engineers (ITE) publication titled *Parking Generation, 4th Edition*, are an option. However, they represent a wide range of locales and generally do not represent the mixed-use interaction and shared parking that occurs in a downtown area such as in Zionsville. Thus, a local rate was developed resulting from the actual weekday peak parking counts and occupied ground-floor space Downtown.

Local Peak Parking Rate

Since the parking utilization characteristics vary throughout the Downtown study area, a selection of peak parking counts and floor area focused on the Downtown core where the utilization and business activity is generally most consistent. This core area is defined by Cedar Street on the north, Sycamore Street on the south, Elm Street on the east, and 1st Street on the west. Within this area, occupied ground-floor space totals 218,578 square feet. During the weekday peak hour, the number of parked vehicles within the same boundaries was measured at 364 spaces, resulting in a parking rate of 1.67 spaces/1,000 sf. While it's possible that some parking demand generated from uses within the defined core occurred west of 1st Street or north of Cedar Street, the parking counts and observations during the count suggest any spillover parking demand is not significant.

Parking Rate Comparison

Peak parking rates published in ITE's *Parking Generation, 4th Edition* for retail and restaurant uses are considerably higher than the observed peak parking rate in Downtown Zionsville. This could be due to several factors, including the varying contexts (auto-oriented vs. downtown district), mix of uses, and business hours, among others. **Table 21** provides a comparison of a weighted average peak parking rate using ITE data and a breakdown of retail and restaurant ground-floor space in the defined Downtown core boundaries with the calculated peak parking rate for Downtown based on the parking counts and occupied floor area.

Table 21. Peak Parking Rate Comparison

Use	Local Rate	ITE
Retail	N/A	4.1 spaces/1,000 sf
Restaurant	N/A	10.6 spaces/1,000 sf
Calculated/Weighted Average	1.67 spaces/1,000 sf[1]	4.7 spaces/1,000 sf[2]

N/A - Not available
1 - Based on measured core area peak parking utilization and occupied ground-floor area
2 - Weighted average is based on ITE *Parking Generation, 4th Edition* and existing Downtown retail and restaurant floor areas

Although using the ITE peak parking rate would yield a more conservative analysis, providing too much parking in a downtown district can have a similar negative impact as not providing enough parking. Overestimating the need for parking could result in several negative impacts such as the eventual construction of spaces that are consistently underutilized, missed development opportunities that may require more parking that can be accommodated on a site, and not use limited real estate opportunities for their best possible use. The overall intent is to establish a parking plan that supports a strong business community while balancing the charm and authentic character of Downtown. Thus, use of the 1.67 spaces/1,000 sf parking rate that reflects the local parking utilization characteristics is recommended.

Future Projection

Based on the evaluation of Downtown's business mix and understanding of current occupancies along with the market share analysis, two key factors are identified in terms of estimating future parking needs; the amount of vacant space that can be occupied and the amount of new additional floor area that should be developed. Using these two values and the local peak parking rate, a sense of future peak parking needs can be projected. **Table 22** summarizes the calculation of an estimated future peak parking demand growth of 29 spaces Downtown. **Table 23** provides a comparison of existing peak parking utilization with future conditions.

Table 22. Projected Peak Parking Growth

Floor Area	Local Peak Parking Rate	Floor Area	Projected Growth
Vacant	1.67 spaces/1,000 sf	7,000 sf	12 spaces
New Development		10,000 sf	17 spaces
TOTAL		17,000 sf	29 spaces

Table 23. Existing vs. Future Peak Parking Comparison

Condition	Occupied Spaces	Percent Utilization
Overall		
Existing	531	61%
Estimated Growth	+29	
Future	560	65%
Public Spaces Only[1]		
Existing	332	77%
	+29	
Future	361	84%

1 - Scenario assumes all additional demand uses public parking

As shown above, the projected parking of 29 spaces to account for occupancy of vacant space and new development that achieves the market share goal can be accommodate with the existing overall parking supply. However, if all additional parking uses public parking and no new spaces are provided, the peak public parking utilization is expected to grow from 77 percent to 84 percent.

RECOMMENDATIONS + IMPLEMENTATION STRATEGY

Based on analysis of market and parking conditions in Downtown and the broader market study area, this section outlines key plan recommendations.

MARKET STUDY RECOMMENDATIONS

The Town's 2012 Economic Development Plan's goal for Downtown Zionsville was to assure its long-term vitality. The study area, comprising the Village and surrounding areas, have five (5) competitive advantages as a traditional downtown locale:

- Zionsville's consumer markets are universally strong. It is why independent businesses want to locate 'on the bricks' and nearby and why larger format retailers and restaurants choose Michigan Road. It is also why investors are interested in potential development sites for varied uses throughout the Town, including new employment.
- Downtown Zionsville has many knowledgeable and savvy retailers and restaurateurs. These businesses serve their customers well, know how to make money, and readily respond to rapidly changing consumer trends and preferences. These business owners understand that they are responsible for promoting their business to their customer base. Supporting the sales growth and expansion plans of these existing owners represents an important part of the study area's economic future.
- The consumer survey results noted that residents are routine users of Downtown businesses. Zionsville also attracts regional visitors through special events and its collection of small businesses. Appealing in targeted ways to both segments is key to overall sales growth.
- The study area, as a traditional downtown, offers a unique combination of vintage space in the Village and new space on the periphery. The Village provides a pedestrian-oriented experience, or 'feel.' The remainder of the study area can serve as the locations for multiple regional businesses, such as Bub's Burgers, with operating models that require parking, a slightly larger footprint than permitted under Village Business District zoning, and the access and visibility of a higher traffic corridor. The uses in this part of the study area could also include small office users, again with a preference for on-site parking. Physically linking the Village and South Main Street in the study area to potential new uses and developments, such as Creekside Corporate Park at Zionsville, outside of the study area will be key. (Any retail or restaurant uses intended for just outside of the study area should be placed in locations identified as suitable for retail success.)
- Throughout this study, 'authenticity' has been the word most used to describe the Village and downtown Zionsville. As an 'authentic' place, Zionsville's downtown is different. It provides that unique 'experience' that residents and visitors seek. The Village and the surrounding area, including Lions Park, are where residents gather and what they individually identify as their downtown. Practically, authenticity is the marketing platform for future district promotions.

To capitalize on these significant competitive advantages, Town officials, their partner organizations, and Zionsville residents must collaborate to ensure downtown's future. There is no other option; there is simply too much at stake. Turf wars, hidden agendas, 'gotcha' politics, 'old versus new' residents and other similar postures inhibit the implementation of positive programs or policies that can benefit the study area. In working to either improve or sustain any commercial district, particularly a traditional downtown, change is the only constant—real estate values and rents go up or down; business types and formats change or evolve; and businesses close for many reasons based upon owner decisions. Partners can and will disagree about certain issues. Some programs or policies may work well; others may not. The key is emphasizing downtown's future and the Town's stated economic development goal to sustain that viable downtown over the long-term.

The following market study recommendations are intended as comprehensive and purposeful. They are organized as three (3) sets of strategic market actions: Roles and Responsibilities; Image and Identity; and Business Development. These actions should also be integrated with this project's parking recommendations. Within each set of actions, there are actions to initiate change, incremental actions for managing ongoing change, and actions to sustain momentum in implementing these recommendations.

More detailed Action Plans follow this section, but three (3) catalyst recommendations can be completed within the next two (2) years.

1. The Town and its partners need to work together to identify how to best manage and advocate for the Village and the overall study area. As the peer communities reveal, multiple organizational structures are used throughout the Midwest and nationally to focus on downtown growth. Zionsville's effort, like those in the peers, will require a full-time staff person appropriately compensated. This staff will be dedicated to downtown success and will provide ongoing focus on the implementation of these study recommendations. Through this organizational work, the Town, its Redevelopment Commission, its Economic Development Commission, and downtown Zionsville's many partners can clarify future roles and responsibilities in their important downtown work. Members of this study's Steering Committee also represent potential resources and partners for this organizing effort.

2. From a promotion perspective, the Town and the Chamber can energize downtown events and marketing and begin to focus on the destination market. Some initial tasks include: working with the Boone County Convention and Visitors Bureau to review special events programming and their target visitors; working with downtown businesses on cluster promotions; and begin to include downtown's 'authenticity' in marketing materials and media specific to the destination market. To refine promotion efforts, ask downtown's businesses to conduct a one-month zip code survey of their customers and visitors.

3. Town officials and the Chamber should conduct initial outreach to downtown business and property owners and local brokers to share survey results, particularly those about operating hours, and study recommendations. Initial priorities include meeting with owners from the key business categories and the owners of vacant lease space. This outreach can also ask owners to identify any

issues with existing incentives available to downtown's owners and to determine owner objectives for their businesses and properties. The Town and the Chamber should continue their strong collaboration assisting new businesses joining the study area mix and identifying new and unique ways that all of downtown's businesses can work together. As noted in the action plans, this outreach should be considered an ongoing activity that responds to study area needs.

PARKING ANALYSIS RECOMMENDATIONS

Whether residents of Zionsville or visitors from throughout the surrounding region, some of the first and last things customers experience during their trip Downtown is parking. In order to make the parking component of their visit uneventful and to support businesses strengthening Downtown, four key recommendations are outlined below with additional considerations for long-term implementation.

Public-To-Private Parking

What: Establish lease agreements with private property owners to allow public parking in privately-owned spaces. Leases may consist of either a partial lease (certain days of the week or subject to time-of-day restrictions) or a full lease with the ability to park as needed.

Why: Private parking accounts for one half of Downtown's parking supply and currently experiences low utilization during both weekdays (45 percent peak utilization) and Saturdays (38 percent peak utilization). As Downtown welcomes new businesses and becomes home to more restaurants, which generate a higher rate of parking relative to retail uses, public parking utilization will approach, and may surpass, desired peak levels (greater than roughly 85 percent). Providing public access to existing private spaces creates additional parking for Downtown visitors without constructing additional infrastructure or using limited real estate for parking when it may have a better viable use.

Benefits:

Property Owner

- Town provides maintenance for parking lot (e.g., striping, pavement repairs, plowing)
- Town covers liability insurance
- Likely source of additional revenue

Town

- Increases parking supply available to the public without costly construction of new parking facilities (customer and/or employee parking)
- Maximizes utilization of existing facilities and infrastructure

How:

- Annual lease payment based on average operations/maintenance costs per space (approximately $250 per space)
- Funding
  - TIF
  - Fees in-lieu of required off-street parking into a transportation benefits fund
  - General fund

Considerations:

- Tenant lease agreements may include off-street parking, thus requiring lease modifications or limiting the availability of spaces for public use
- Lease payment must be high enough to offset loss of dedicated parking
- Waiver of ordinance non-compliance for properties no maintaining the required number of off-street spaces.
- To convey availability to public parkers, current private lots must be properly signed (e.g., Wayfinding from Main Street, Identification as Public Parking, Daily or Time-of-Day Restrictions) in a clear, but concise way at the lot access and at a primary route such as Main Street, depending on visibility. Signs should maintain Downtown's desired character and be cognizant to not contribute to visual clutter.
- Pursue opportunities with fewer larger lots versus several smaller lots to consolidate agreements, require fewer signs, and limit maintenance improvements.

Locations:

A.) Bank Overflow Lot (19 spaces)
B.) Bender's Square Lot (32 spaces)
C.) Cabin – west side of Elm Street (20 spaces)
D.) 20-40 Cedar (10 spaces)
E.) Lee's Building – west side of Main Street (8 spaces)

In-Lieu Parking Fees

What: Establish a policy allowing a fee to be paid by a property owner for a new development to compensate for a waiver from providing their full off-street parking requirement

Why:

- Site constraints can limit a property owner's ability to provide all required parking spaces
- Facilitates optimal site development while not having to accommodate all required parking on-site
- Potential funding vehicle for Downtown public parking accommodations and improvements

Benefits:

Property Owner

- Site constraints may limit ability to satisfy parking requirements

Town

- Achieve optimal design of buildings/sites
- Contributions into a dedicated transportation/parking fund

How:

- Fee based on average assessed value of undeveloped land in downtown area (assume 325 sf/space) and construction costs for compensatory parking
- Multiple Payment Options
  - One-time fee
  - Annual fee (e.g., property tax surcharge), potentially up to a maximum

Considerations:

- Should a fee cover the total cost of constructing new spaces Downtown vs. Setting a rational incentive for good site design
- Since constructing a structured public parking facility is not likely, Zionsville should consider a fee relative to surface parking costs
- Consider a graduated rate with increasing unit costs as the number of spaces increases (encourage infill with a small waiver vs. market value vs. encourage some level of new parking on-site to serve site's needs)
- With few opportunities for new development in the Downtown area, the potential to collect enough fees during the approval/permitting process for new projects is limited

Establish Employee Designated Parking

What: Designated parking area for downtown employees that makes the most convenient spaces available for visitors

Why:

- A number of downtown parkers (likely employees) who occupy premium parking spaces limit accessibility for Downtown visitors
- Main Street and the Public Lots experience approximately 60 weekday parkers for durations of six (6) or more hours

Benefits:

Business Owner

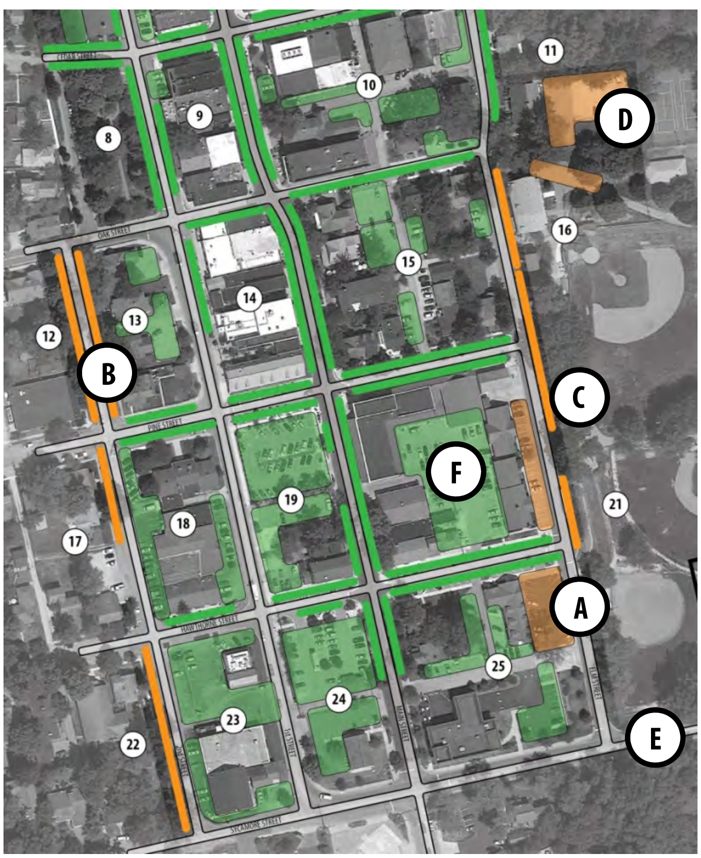
- Increased convenient parking for customers

Town

- Prioritizes customer parking along Main Street and in public lots
- Reduced potential for unnecessary traffic circulation in search of available parking

Locations:

A.) Bank Overflow Lot (19 spaces)
B.) 2nd Street
C.) Elm Street
D.) Lions Park - north (16 spaces)
E.) Lions Park - south (50+ spaces)
F.) Private Lot (varies)



Hybrid Loading/Parking Zones

What: Combined loading zone/parking spaces with respective time restrictions

Why: Several trucks delivering to downtown businesses impact traffic flow, particularly along First Street

How:

- Designate and post signs identifying 2-3 select areas
- Downtown business owners should be encouraged to leverage resources, coordinate, and consolidate vendors and deliveries, as feasible
- Loading zones active 8-11:30 AM. Public parking permitted at all other times

Locations:

A.) First Street (Cedar to Oak)
B.) First Street (Just North of Cedar)
C.) Pine Street (First to Second)

OTHER TRANSPORTATION CONSIDERATIONS FOR POTENTIAL NEEDS

While need for the following strategies are not readily apparent today or in the near-term, the following measures are worth exploring and keeping in mind for the future as conditions evolve Downtown.

Additional/New Bike Parking

Over the next several years, as trail connections to/from to south are constructed, providing additional bicycle parking would welcome for visitors riding to Downtown. Further, certain retail businesses or restaurants may offer goods and services that cater to bicyclists as a key demographic. While bicyclists can adapt when designated options are not available to secure a bicycle, an absence of racks in convenient locations typically results in bicycles secured to street signs, railings, poles, fences, trees and other unintended locations. Aside from lack of organization and detracting from streetscape aesthetics, haphazard securing of bicycles to unintended locations can result in damage to those fixed objects and conflict with pedestrian patterns.

Currently, some sidewalk areas Downtown, particularly along Main Street, do not offer enough width to comfortably accommodate bike racks, adjacent maneuvering space, and a clear path for pedestrians. Like motorists, bicyclists prefer to park as close to their destination as possible and the flexibility afforded by a bicycle can lead to bicycles parked in unintended areas when designated options are not conveniently available. To encourage biking trips Downtown and respond to increased demand over time, consider opportunities for installation of bicycle parking at key areas with the following general guidelines:

- Use inverted "U", "A", or similar rack frame styles in which bicycles are secured on either side and parallel to the rack face. Avoid racks that do not support the bicycle frame and only provide support at the wheel.
- If in a side-by-side grouping, racks should be spaced at least 30 inches apart.
- Provide six feet for the length of a bicycle attached to the rack and four feet to maneuver bicycles in/out.
- Consider opportunities for on-street bicycle parking when off-street conditions are too constrained. Racks installed on-street in the place of a parallel vehicular parking space typically yields parking capacity for 10 to 12 bicycles. Due to seasonal variations in bicycle ridership and parking demand, such on-street bike parking could be in place during warmer months and returned to vehicle parking in from late fall to early spring months.

Reformat Private Parking Encroaching on Public ROW

Several parking spaces that are signed and considered as private parking along the east side of 1st Street just north and south of Cedar Street actually encroach, and in many cases are primarily located, on public Right-of-Way. The Town should coordinate with adjacent property owners to appropriately reconfigure the spaces to be entirely on either public or private property and apply a corresponding public or private designation. If the space is primarily within the public Right-of-Way, priority should be made to reconfigure as a public parking space.

Valet

One potential growth opportunity based on the market share analysis for the Downtown area is restaurants. The parking data and observations indicate that overall parking utilization in the evening does not reach the same levels as the weekday and Saturday daytime peaks. During the evening hours, while parking along segments of Main Street is well utilized, plentiful parking is typically available along several east-west streets and Elm Street. Most restaurant-goers appeared comfortable walking a couple blocks between their destination and an available space. However, if the number of dinner-oriented restaurants increases considerably and are concentrated within Downtown, parking spaces during the evening hours, while likely available, will be further from visitor's destinations. Some restaurant owners may wish to pursue providing valet service for customer convenience.

If valet service is pursued, this must be regulated by the Town. Valet-parked vehicles should make use of less convenient and underutilized spaces. These spaces may be in private lots that are restricted from public use or located on peripheral blocks not otherwise used during evening hours by public parkers. Since public parking is not metered and does not include time restrictions, enforcement of valet compliance with the use of designated spaces is *strongly* recommended in order to prevent valet operators from monopolizing all proximate public spaces. Even with meters and time-restricted zones, valet services often control the turnover of spaces with their customer's vehicles to keep them from being occupied by non-customer vehicles.

In addition to typical license and insurance requirements, valet operating regulations should include diligent enforcement of:

- Allowed curbside loading zone size (typically two spaces)
- Loading zone signage (preferably temporary to avoid sign clutter throughout the day)
- Avoiding the creation of traffic congestion/safety issues (e.g., double parking, blocking of travel lanes, vehicle queue spillover into adjacent intersections)
- Compliance with use of leased private lots or designated peripheral parking zones

POTENTIAL DEVELOPMENT TYPOLOGIES

Over time, various properties in or near the Downtown area may be considered for new development. The scope of this study does not include proposed development review and zoning analysis, nor does it contemplate proposing specific development concepts, site designs, or configuration/massing of buildings on particular properties. However, the following four pages outline some general principles, relative to the market share analysis and parking considerations, for sites that may attract developer interest within or adjacent to the Downtown area in the near- or long-term future.

POTENTIAL DEVELOPMENT TYPOLOGIES

Context Map

Area 1 The Friendly Lot/Former PNC Bank Parcel
Area 2 Former Citgo Parcel
Area 3 West Side of 1st Street (Multiple Potential Parcels)

POTENTIAL DEVELOPMENT TYPOLOGIES

Area 1

POTENTIAL USES

Ground Floor

- Restaurant
- Retail

  (if an optimal location and it strengthens the Downtown business mix)

Upper Floors

- Office/Professional Service

PEDESTRIAN / BICYCLE

Support Walkability

- Sites should be designed with ample space along all sides to accommodate pedestrian circulation, potential outdoor restaurant seating, and streetscape features.
- Factor intersection improvements at Main/Sycamore/1st to link the site to adjacent businesses/properties south of Sycamore Street

PARKING

Any displacement of existing public parking should be compensated nearby

Restaurant / Retail / Office / Professional Service

- Parking may be provided on site and/or utilize downtown parking
- Some commercial uses will prefer off-street parking at some locations
- Employee parking, if not provided on site, should occur in peripheral locations or in an-employee-designated zone
- Parking provided for non-residential uses should be shared for use among Downtown patrons and not designated for only for a specific business. This approach encourages a 'park once' mentality, where visitors can patronize a business and be able to walk Downtown to other shops or restaurants as well without having to drive and park again. Parking conditions should be monitored to ensure that such spaces turnover at a reasonable rate.

Structured Parking

- Considerably more expensive than surface parking
- Spatial constraints, such as parcel depth and length, will limit the feasibility to accommodate efficient designs for module widths and appropriate ramp slopes.
- Above-grade structures are generally not consistent with the character of Downtown Zionsville. Below-grade parking is considerably more expensive than above-grade structured parking.

POTENTIAL DEVELOPMENT TYPOLOGIES

Area 2

POTENTIAL USES

Ground Floor

- Restaurant
- Retail
  (if an optimal location and it strengthens the Downtown business mix)
- Office/Professional Service

Upper Floors

- Office/Professional Service
- Residential
  (at right location that is consistent with the Downtown Character)

PARKING

Restaurant / Retail / Office / Professional Service

- Parking provided, at least in part, on site with some potential for use of downtown parking
- Commercial uses will prefer off-street parking
- Employee parking, if not provided on site, should occur in peripheral locations or in an employee-designated zone
- Parking provided for non-residential uses should be available for shared use among Downtown patrons and not designated only for a specific business. This approach encourages a 'park once' mentality, where visitors can patronize a business on site and be able to walk to other Downtown shops or restaurants as well without having to drive and park again. Parking conditions should be monitored to ensure that such spaces turnover at a reasonable rate.

Residential

- Self-parked on site

Structured Parking

- Considerably more expensive than surface parking
- Constraints related to flood plain limit where structured parking may be feasibile
- Above-grade structures are generally not consistent with the character of Downtown Zionsville. Any above-grade parking would likely need to be hidden. Below-grade parking is considerably more expensive than above-grade structured parking.

PEDESTRIAN / BICYCLE

Support Walkability

- Sites should be designed with ample space along public streets to accommodate pedestrian circulation, potential outdoor restaurant seating, and streetscape features.
- Future improvements at Main/Sycamore/1st to address traffic issues should be designed to prevent the intersection and Sycamore Street from becoming a pedestrian barrier to the rest of Downtown.
- Pedestrian accommodations should be integrated to link recent development south of the site along Zionsville Road to Downtown.

POTENTIAL DEVELOPMENT TYPOLOGIES

Area 3

POTENTIAL USES

Ground Floor

- Restaurant
- Retail

  (if an optimal location and it strengthens the Downtown business mix)

Upper Floors

- Office/Professional Service
- Residential

  (at right location that is consistent with the Downtown Character)

PARKING

Restaurant / Retail / Office / Professional Service

- Parking may be provided on site and/or utilize downtown parking
- Some commercial uses will prefer off-street parking at some locations
- Employee parking, if not provided on site, should occur in peripheral locations or in an-employee-designated zone
- Parking provided for non-residential uses should be shared for use among Downtown patrons and not designated for only for a specific business. This approach encourages a 'park once' mentality, where visitors can patronize a business and be able to walk Downtown to other shops or restaurants as well without having to drive and park again. Parking conditions should be monitored to ensure that such spaces turnover at a reasonable rate.

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- Self-parked on site

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- Above-grade structures are generally not consistent with the character of Downtown Zionsville. Below-grade parking is considerably more expensive than above-grade structured parking.

PEDESTRIAN / BICYCLE

Support Walkability

- Sites should be designed with ample space along public streets to accommodate pedestrian circulation, potential outdoor restaurant seating, and streetscape features.
- Future improvements at Main/Sycamore/1st to address traffic issues should be designed to prevent 1st Street from becoming a pedestrian barrier to the rest of Downtown.

STRATEGIC ACTION PLAN

The following outlines key initiatives and action items toward implementation of the recommended market and parking measures. This summary should be considered a dynamic plan that is flexible to adjust timing and/or priority as Downtown conditions evolve and opportunities materialize.

ROLES AND RESPONSIBILITIES

OBJECTIVE: *To Establish Role of Lead Entity and Staff After Organizing*

Action	Timeframe	Current Priority Level
Conduct ongoing outreach with downtown stakeholders	Ongoing	High
Develop new partnerships to further downtown business development objectives	Mid-Term	Medium
Access and apply regional business resources	Mid-Term	Medium
Implement this study's business development plans	Mid-Term	Medium

IMAGE AND IDENTITY

OBJECTIVE: *To Tell Downtown's Unique Story*

Action	Timeframe	Current Priority Level
Define the story for residents, visitors, and investors	Ongoing	Medium
Develop business attraction materials, incorporating the study and survey results, for use in promoting downtown to new business prospects.	Ongoing	High
Design downtown logo and related marketing materials, integrating with the Town's logo and tag line and incorporating key downtown attributes--local support, authenticity, strong businesses, physical activity, 'On the Bricks,' etc.	Mid-Term	High
Engage businesses in above work and in use of story and graphics	Mid-Term	Medium
Re-introduce downtown to target markets	Ongoing	
Craft the story to available and selected media	Mid-Term	Medium
Evaluate story impact through media metrics and downtown surveys	Annually	
Consider a downtown Zionsville branding process after above work	Long-Term	Low

IMAGE AND IDENTITY

OBJECTIVE: *To Promote Downtown*

Action	Timeframe	Current Priority Level
Promote current downtown offering actively through traditional media and social media in destination drive time	Short-term	High
Encourage business participation in promotion of entire district	Short-term	Medium
Identify additional image enhancement programming for downtown	Mid-Term	Medium
Identify cluster or business promotion activities to generate sales for downtown, based upon business input	Mid-Term	Medium
Support downtown events organized by other entities	Ongoing	High
Evaluate special events, image work, and retail promotions at least annually	Annually	

BUSINESS DEVELOPMENT

OBJECTIVE: *To Promote Quality in Business Operations*

Action	Timeframe	Current Priority Level
Educate business owners about survey results and operating hours (with the understanding that this takes time)	Short-term	High
Provide educational opportunities for businesses to learn techniques, understand trends, or skills to increase sales	Ongoing	
Work with property owners to ensure quality lease space availability for desired tenants	Mid-term	Medium

BUSINESS DEVELOPMENT

OBJECTIVE: *To Enable Business Expansion, Retention, and Recruitment*

Action	Timeframe	Current Priority Level
Match incentives to opportunities by: Considering TIF and other funding sources, and linking incentives to business needs, practices and capacity	Ongoing	
Build and capitalize on relationships with Downtown's local small business owners with multiple locations, such as Bub's and Delaney's. Identify new possible relationships with similar owners.	Mid-term	Medium
Build relationships with the local brokerage community representing all uses	Mid-term	Medium
Work with study area business owners interested in expansion or a new concept development based on ongoing outreach	Mid-term	Situational
Link regional business resources to business owners, as developed, and position downtown management as a resource	Long-term	Low/Will occur with focus
Continue work with businesses interested in a study area location	Ongoing	
Work to ensure the right tenant at the right location	Ongoing	
Enable physical and business-to-business links among the Village, the remaining study area, and future nearby development	Long-term	Low, initially
Monitor business development activities for successes and to identify refinements	Annually	
Monitor business succession issues in the study area	Long-term	Situational

BUSINESS DEVELOPMENT

OBJECTIVE: *To Foster Long-Term Entrepreneurial Growth*

Action	Timeframe	Current Priority Level
Consider interim uses, such as pop-ups, to activate vacant lease space in partnership with owners	Mid-term	Medium
Consider emerging uses, such as co-working space, to increase downtown employment	Long-Term	Low
Apply relationships with regional entrepreneurial resources to identify emerging business formats and potential tenants to enhance the mix	Long-Term	Low
Support the growth of new nearby populations, both residential and employment, and new area amenities	Mid-term or Long-term	Situational

BUSINESS DEVELOPMENT

OBJECTIVE: *To Monitor and Manage Downtown Business Growth*

Action	Timeframe	Current Priority Level
Work to attain market share goals defined in this study	Long-Term	Low
Develop relevant benchmarks for downtown growth. Examples include vacancy rates, festival attendance, business economic surveys, etc.	Long-Term	Low
Apply measurements to respond to market changes and apply to Image and Identity programming	Long-Term	Low
Share data with partners and downtown stakeholders	Long-Term	Low

PARKING

OBJECTIVE: *To Support Downtown Businesses Operations*

Action	Timeframe	Current Priority Level
Work with property owners to establish lease agreements (full or partial) to allow public use of private parking spaces.	Mid-Term	High
Develop a policy and fee structure to allow payments in lieu of providing the full off-street parking requirement	Mid-Term	Low
Designate peripheral or underutilized parking spaces for use by Downtown employees only. This would allow convenient spaces currently occupied by employees to be available for Downtown visitors/patrons.	Short-Term	Medium
Establish designated loading zones for Downtown business deliveries in the morning. These spaces would be available during the weekday lunch/afternoon hours and weekends	Mid-Term	Medium
Create new convenient bicycle parking accommodations to support active transportation visits to Downtown and compliment planned trail connections	Mid-Term	Medium
Coordinate reconfigured private parking encroaching on public ROW with First Street improvements	Long-Term	Medium
Consider regulations to permit valet operations to maximize use of peripheral/private spaces as restaurant presence increases	Long-Term	Low

APPENDIX

Consumer Survey Results

CONSUMER SURVEY RESULTS

Zionsville's consumer survey was conducted between September 5, 2013 and October 15, 2013. The consumer survey consisted of twenty-four (24) questions; twelve (12) questions addressed specific consumer experiences, and five (5) questions solicited information for the parking component of this overall study. The following section summarizes the results of the consumer survey. The focus of Zionsville's consumer survey was to identify market-supported uses for the downtown study area, including the Village. (In this study's final report, the detailed results provided for each question will become an appendix.)

After obtaining agreement from Town officials on the contents of the consumer survey instrument, the survey link was distributed through the Town's website and publications, the project website, the project website, through local schools, and virally by the Zionsville Chamber and by Zionsville businesses and residents. At survey closing, 901 responses were received. The survey reliability, or confidence level, is 99% with a margin of error of +/- 4.2%. This means if you interview 901 people, finding that 50% of them answer a question in a particular way and desiring the survey confidence level to be 99%, the corresponding confidence interval is +/- 4.2%. Therefore, you are 99% certain that the true population proportion falls into the range from 45.8% to 54.2%. Also, at this confidence level and sample size, there is slightly less than a one in twenty chance that the true population proportion will fall outside this calculated range. As the sub-groups represent smaller samples with greater variability, the difference between the full sample and the sub-groups must be larger, perhaps 10%, to represent a significant difference.

Fundamentally, these consumer survey results identify what respondents think, not why they think the way that they do. These survey results also identify respondent behaviors and attitudes about Zionsville's shopping and dining options. In addition, one important objective of this consumer survey is obtaining data about specific businesses or business categories that would affect additional purchasing. Responses to certain specific questions identify non-Zionsville stores and restaurants where respondents made purchases. These response lists offer potential leads of either businesses or business categories likely to be good additions to the study area's existing commercial properties and future developments, and these lists represent tenanting opportunities for the Town's property owners and managers. Understanding these tenant possibilities can aid recruitment of best new businesses to the optimal study area locations and can open doors to these same potential tenants by providing market data unavailable from other resources.

In addition to this larger consumer survey closed in October, a similar survey was conducted with two (2) classes at Zionsville Community High School. Current Zionsville population data indicates that about 1/3, or 33.7%, of Zionsville residents are under 20 years of age. (Source: U. S. Census Bureau.) The larger survey had yielded 1 response from that age group. Given Zionsville's youth numbers, Town officials and this study's steering committee suggested additional input from this age group. This input was obtained through a joint focus group with both classes and through a consumer survey. This consumer survey instrument, provided to the high school classes via a link to their instructors, was modified to respect concerns about student privacy. This student survey was opened on October 28, 2013 and closed on

November 21, 2013 with 49 responses. Every student from both classes completed the survey. These student survey and focus group results are described separately below.

The larger consumer survey results document both the responses from the full sample and the response variations among four (4) subgroups.

- Long-term residents, or respondents who have lived in Zionsville for 5 or more years (N=563) *Statistically Valid Sub-group*. The long-term resident sub-group skews older than the full sample. A higher percentage of these long-term residents live within 5-minutes of downtown compared with the full sample (62.7% versus 56.6%). This sub-group also spends slightly more on meals away from home than the full sample.
- New residents, or respondents living in Zionsville for less than 5 years (N=193) *Small Sample Size.* This sub-group skews slightly younger than the full sample and has different observations about downtown from Long-term residents.
- Respondents who never shop, or make a purchase, in downtown Zionsville (N=173) *Small Sample Size.* This sub-group is younger. Nearly 95% drive to downtown Zionsville when they come to dine. 88.8% are Zionsville residents and nearly 62% have lived in Zionsville for five (5) years or more. Their households are slightly more likely to fall into the 'Other' category versus the other more traditional categories noted in the survey instrument.
- Respondents in the 35-44-age category (N=252) *Small Sample Size.* This age category is an important market cadre and typically exhibits with the highest levels of consumer spending.

The sub-group for long-term Zionsville residents represents a statistically valid survey sub-group, and these results have a 95% confidence level with a margin of error of +/- 4.0%. The smaller sample sizes noted above mean that response variations greater than +/-10% most likely suggest true differences from the populations as a whole. One additional sub-group, Non-Residents, was analyzed. The responses from this small sub-group (N=43) were similar to those of the full sample.

Throughout the survey results, shaded table cells or written comments indicate these significant response differences. In calculating percentages specific to respondent satisfaction or inclination to spend, "I don't know" responses were removed from the totals before rankings were created. Making this adjustment removes potential misinterpretations resulting from unusually high "I don't know" responses compared with other items with lower numbers of "I don't know" responses. Finally, observations about the results for each question are provided, and as appropriate, the implications for economic and business development are noted. Certain basic demographics were used to determine sample quality and are included within these results.

These consumer survey findings reflect the overall results from the 901 survey respondents. Among the respondents, 858 were Zionsville residents.

- Respondents shop and dine in Zionsville. Most routinely shop on Zionsville's Michigan Road corridor and the Boone Village area, followed by downtown. Survey respondents also dine in the same areas, most frequently (25.6% at least weekly) in downtown Zionsville.
- Respondents frequent Zionsville's downtown area, but most make only quick trips—about 40% visit downtown for one (1) hour or less. Few stay for more than two (2) hours or routinely visit the area with out of town guests.
- Respondents who indicated that they never shop in downtown Zionsville dine in downtown restaurants, but they dine less frequently than the full sample and other sub-groups.
- Respondents patronize 'brick and mortar' stores and purchase online, reflecting the broader national trend of shopping through multiple channels.
- Over 50% of respondents would spend more in six (6) business categories. These categories are: Specialty foods, Bakery, Grocer, Ice cream/candy, Home accessories, and Women's apparel. These categories represent two potential opportunities: strengthening existing Village business clusters, such as women's apparel or specialty foods, and recruitment options suitable for Village's tenancies and for potential nearby development.
- Respondents were generally very satisfied with downtown's physical and appearance factors. Over 80% of the full survey sample rated general safety, general attractiveness, and cleanliness as excellent or above average.
- Respondents expressed overall satisfaction with parking convenience and traffic flow in the study area, including in the Village.
- Certain satisfaction factors controlled by the Village's businesses, specifically store hours and variety of available goods, received the lowest satisfaction ratings from the full survey sample.
- The importance of casual dining options was noted throughout, including by restaurant format. Entertainment options for after dining were also noted as desirable in the survey results (and in the project workshops).
- Zionsville's survey respondents indicate that it is most convenient for them to shop at the following times: Saturdays (78.5%), Sundays (68.1%) and early evenings, or 5PM-7PM (58.7%).
- Among the Zionsville residents responding to the survey, 62% have lived in the Town for five (5) or more years.
- Nearly 49% of respondents indicate that their households spend $75 or more on meals away from home each week.
- Respondents, in their comments throughout the survey results, want a great downtown Zionsville and indicated that the Village was one of the amenities important to their choice to live in Zionsville.

Question 1: In an average month, how many times do you dine in these commercial areas?

This question details respondents' dining frequency for downtown Zionsville and for nearby commercial districts. Data for the full sample and sub-groups are shown.

Table 3: Full Sample Responses

In an average month, how many times do you dine in these commercial areas?

Answer Options	Never	3 or fewer times per month	Weekly	A few times per week	Daily	Response Count
Downtown Zionsville	97	565	176	43	9	890
Downtown Carmel	489	357	29	4	0	879
Michigan Road corridor	136	529	156	52	10	883
Clay Terrace, Carmel	426	414	28	8	0	876
Hamilton Crossing area, Carmel	780	81	3	2	0	866
Boone Village area, Zionsville	183	537	111	42	10	883
Anson Marketplace	433	366	53	24	1	877
Traders Point area, Indianapolis	224	556	80	19	1	880
Castleton/Keystone area	440	406	22	8	0	876
Downtown Indianapolis	359	437	43	16	13	868
Other (please specify)						47
					answered question	**897**
					skipped question	**4**

Illustration 3: Full Sample Rankings for Dining At Least Weekly

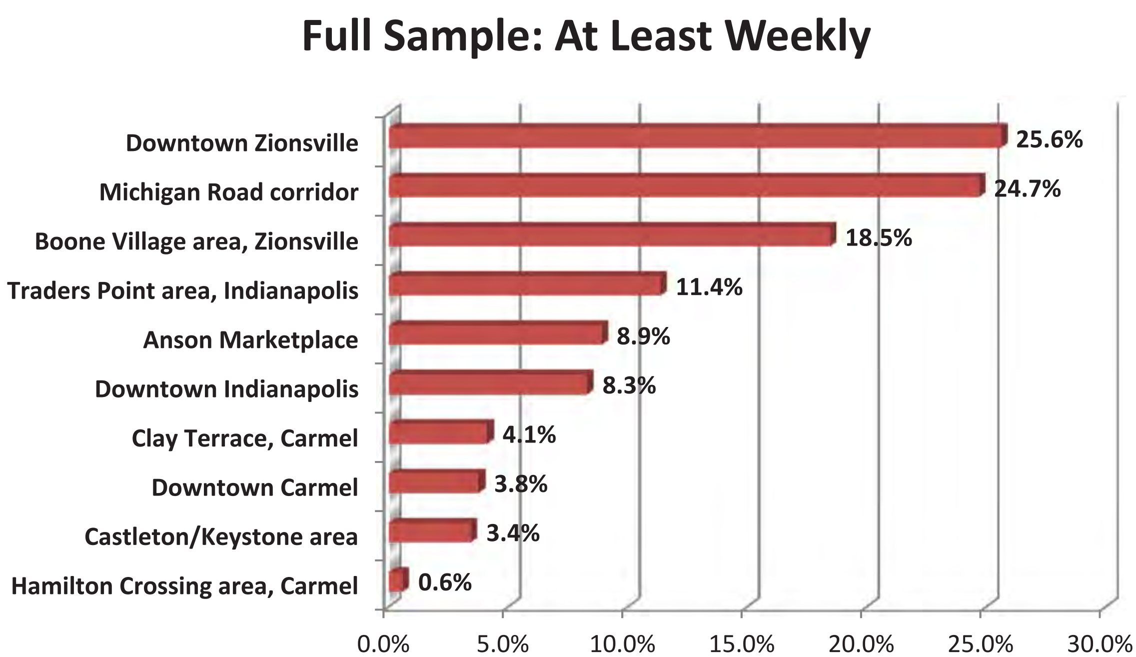


Table 4: Full Sample and Sub-Group Responses

Dine At Least Weekly	Full Sample	Long Time Residents	Newer Residents	35-44	Never Shop DT
Downtown Zionsville	25.6%	27.1%	23.3%	24.2%	8.6%
Downtown Carmel	3.8%	3.3%	4.2%	4.5%	8.1%
Michigan Road corridor	24.7%	24.7%	29.0%	26.9%	29.7%
Clay Terrace, Carmel	4.1%	4.2%	4.2%	4.0%	7.5%
Hamilton Crossing area, Carmel	0.6%	0.6%	0.0%	0.8%	1.2%
Boone Village area, Zionsville	18.5%	21.0%	14.1%	16.5%	14.2%
Anson Marketplace	8.9%	10.2%	6.3%	9.2%	10.8%
Traders Point area, Indianapolis	11.4%	10.3%	12.0%	9.2%	9.9%
Castleton/Keystone area	3.4%	2.7%	4.7%	2.4%	5.8%
Downtown Indianapolis	8.3%	8.5%	8.9%	2.4%	8.9%

Question 1: Observations

- Residents, new and long time, are dining in all Zionsville commercial areas frequently.

- Those respondents in the Never Shop Downtown sub-group dine downtown with less frequency.
- Multiple 'Other' responses were noted for the Broad Ripple area.

Question 2: In an average week, how much would you estimate that your household spends on meals away from home (full-service restaurants, take-out, drive-thru, etc.)?

This question quantifies the amount that could be spent weekly by respondents on various dining options in the study area.

Table 5: Full Sample Responses

Answer Options	Response Percent	Response Count
Less than $25	8.9%	79
$25 to $49.99	22.1%	197
$50 to $74.99	20.4%	182
$75 to $99.99	18.2%	162
$100 to $199.99	22.5%	200
Over $200	7.9%	70
	answered question	**890**
	skipped question	**11**

Table 6: Full Sample and Sub-Group Responses

	Full Sample	Long Time Residents	Newer Residents	35-44	Never Shop DT
Less than $25	8.9%	9.2%	7.3%	10.0%	12.1%
$25 to $49.99	22.1%	23.0%	19.4%	22.9%	23.7%
$50 to $74.99	20.4%	18.5%	26.2%	17.7%	20.2%
$75 to $99.99	18.2%	19.4%	14.1%	16.9%	16.8%
$100 to $199.99	22.5%	23.0%	22.5%	26.5%	19.7%
Over $200	7.9%	7.0%	10.5%	6.0%	7.5%
$100 or More	30.4%	30.0%	33.0%	32.5%	27.2%

Question 2: Observations

In the full sample and sub-group, over 40% of all respondents are spending $75 or more on meals away from home. Over 30% spend $100 or more weekly in all but the Never Shop Downtown sub-group.

Question 3: How would the addition of these restaurants affect the amount you spend in Downtown Zionsville?

This question provides information on the respondents' preferred new restaurant formats.

Table 7: Full Sample Responses

How would the addition of these restaurants affect the amount you spend in Downtown Zionsville?

Answer Options	I would spend a lot more	I would spend a little more	No change	I do not know	Response Count
White table cloth restaurant (Leisurely dining, gourmet food, prices matching full service level)	71	253	528	23	875
Casual dining (family oriented menu, with full service)	220	459	197	15	891
Bar or Club (Limited food options and a focus on entertainment or sports)	99	231	496	36	862
Counter service restaurant (Order at counter, employee brings food to the table or carryout)	99	311	423	41	874
Quick service restaurant (Order and receive food at counter, drive thru service)	91	182	549	49	871
				answered question	**897**
				skipped question	**4**

Table 8: Full Sample and Sub-Group Responses

Dining Formats	Full Sample	Long Time Residents	Newer Residents	35-44	Never Shop DT
White table cloth	38.0%	36.9%	39.8%	40.0%	30.0%
Casual dining	77.5%	76.4%	86.8%	87.3%	74.4%
Bar or Club	40.0%	39.3%	45.4%	50.0%	35.5%
Counter service	49.2%	48.7%	58.7%	59.5%	52.7%
Quick service	33.2%	33.7%	39.1%	41.5%	39.3%

Question 3: Observations

- Newer residents and the 35-44 sub-group indicate strong interest increased spending across all restaurant formats.
- Casual dining is strongly preferred by all groups.
- The Bar or club format noted a focus on entertainment or sports and may not reflect the entertainment options described by respondents elsewhere in this survey.

Question 4: In the past month, what non-Downtown Zionsville restaurants did you patronize that you believe would be good additions to Downtown Zionsville?

The responses to this question provide prospective tenant suggestions for multiple dining formats. The restaurants listed most often by all respondents are in **Table 9**. In addition to their specific restaurant suggestions, respondents suggested restaurants by type or format, and those are noted in **Table 10**. **Table 11** is a complete list of the remaining restaurants patronized and listed by respondents.

Table 9: Most Patronized Restaurants

Restaurants Most Patronized	
Panera Bread	58
Cafe Patechou	53
Chipotle	36
Qdoba	24
Chick-Fil-A	20
Noodles and Company	20
Yats	20
Napolese	17
Bazbeaux Pizza	16
El Rodeo	16
McAlister's Deli	16
Gourmet Burgers: Bub's, 5 Guys, etc.	16
Paradise Café	14
Petite Chou	14
Dunkin' Donuts	12
Jimmy Johns	12
Tegry Bistro	12
Scotty's Brewhouse	11
Which Wich	11
Puccini's Pizza	10

Table 10: Restaurants by Type or Format

Restaurants by Type or Format	
Bagel	Italian
BBQ	Japanese
Breakfast/Brunch	Mediterranean
Brew Pub/Microbrewery	Mexican
Burgers	Music/Jazz Bar
Cajun	Outdoor Dining
Chinese	Pan-Asian
Coffee House	Seafood
Deli	Sit-down Sandwiches
Diner	Specialty/Small Grocer with Food Service
Family Friendly	Sports Bar
Farm to Table	Steak House
Fast Food	Sushi
"Foodie"	Taco
Greek	Tapas
Gyros	Thai
Hibachi	Vegetarian
Indian	Vietnamese
Irish Pub	Wine Bar

Table 11: Remaining Restaurants

Restaurants Requested					
20 Tap, 54th & College	Cafe Rio	First Watch Cafe	LongHorn Steakhouse	Petersens	St. Elmo's
3 in 1 tamales	Camille's Sidewalk Cafe	Flapjacks	Lou Malnati's	Philly Cheese Steak	Stacked Pickle
3 Wise Men Brewery	Canal Bistro	Flatwater, Broad Ripple	MacKenzie River	Pho 36	Steak N Shake
Abuelo's	Cancun Mexican	Flemings	Maggiano's	Piada	Stone Creek Dining
Abysinia Ethiopian	Capitol Grille	Fox and Hound	Malibu Grille	Pizza Hut	Sub Zero Ice Cream
Adobo Grill	Capri	freshii	Marcos	Pizzology	Subway
Amalfi's Italian	Carrabba's	Fridays	Matt the Miller's, Carmel	Popeye's	Sullivan's
Amber Indian	Casa Restaurante, Fort Wayne	Goose the Market	Max & Erma's	Portillo's, Chicago and suburbs	Sweet & Savory
Amore	Cerulean	Granite City	Mayberry Café, Danville	Potbelly's	Taco Bell
Amorino	Charleston's Restaurant	Grays Cafeteria	MCL	Punch Burger	Tamale Place
Applebee's	Chatham Tap	Great Harvest	Mellow Mushroom	Pure Eatery	Taste Café
Arbys	Chicago Q	Guapo's	Melting Pot	Quiznos	Tastings Wine Bar
Aristocrat	Cheddars	Handel's Ice Cream	Mesch, Mass Ave.	R Bistro	Ted's Montana Grill
Arni's	Cheesecake Factory	Harry and Izzy's	Mitchells Fish Market, Clay Terrace	Rathskeller	Texas Roadhouse
Athens on 86th	Chili's	Hooter's	Moes Irish Pub	Recess	Thai Orchid
B's Po Boy	China's Best	Illinois St. Food Emporium	Monon Food Company	Red Lion Grog House, Fountain Square	Thai Papaya
Bakersfield	Cinnabon	India Garden	Mudbugs	Red Lobster	The Broadripple Brew Pub
Ball & Biscuit, Mass Ave.	City Barbecue	India Palace	Muldoon's, Carmel	Red Robin	The Egg & I
BarBQ Joint	Claddagh	Indigo Duck	Naked Tchopstix, Board Ripple	Rice Cooker	The Flying Cupcake

Table 11: Remaining Restaurants (cont.)

Restaurants Requested					
Barley Island	Cobblestone Grill	Irvington Brewery	Noah Grants	Rick's Boatyard Café	The Library, Carmel

BBI	Cooking Greek, Carmel	Jacquie's Café, Carmel	Northside Kitchenette	Rita's Water Ice	The Local
BD Mongolian Grill	Cooper's Hawk	Jasmine Thai	Northside Social	Rock Bottom Brewery	The Monon Company, Broad Ripple
Biaggi's	Corner Wine Bar	Jason's Deli	O'Charleys	Rook, Fountain Square	Three Sisters Cafe, Broad Ripple
Big Dave's Deli	Cosi	Jersey Cafe	O'Reilly's	Ruby Tuesday	Tiger Lily
Big Hoffas BBQ	Cracker Barrel	Kazan's Japanese	Oakley's Bistro	Runcible Spoon, Bloomington	Tony Saccos Coal Oven Pizza, Carmel
Bijou, Lebanon	Creation Café, Indianapolis	KFC	Oceanaire	Rusty Bucket	Torchy's Tacos, Austin, TX
Binkleys, Broad Ripple	Culvers	King David Dogs	Ocean Prime	Ruth's Chris Steak House	Trader's Mill Grill
Black Market, Mass Ave.	Curries and Chutneys	Kona Grill	Ocean World, Ditch and 86th	Ruth's Cafe	Trader's Point Creamery Loft
Blend Cigar Bar and Restaurant	Daddy Jack's	Kona Jacks	Oh Yumm! Bistro, 56th & Illinois	Sahm's Golf Course	Tulip Noir
Blu Moon Café, Carmel	Dave's	KT's Bar & Grill, Louisville, KY	Old Eagle Creek Coffee Company	Saigon	Twenty Tap, Broad Ripple
Blue Beard	Dawson's, Speedway and Brownsburg	LA Café, Whitestown	Old Spaghetti Factory	Sangiovese	Union Brewing Co.
Bob Evans	Dehli Palace	La Dolce Vita	Old Style Diner	Sawasdee Thai	Upland Brewery
Boom Bozz	Delicia	La Hacienda	Olive Garden	Scholar's Inn Bake House, Mass Ave.	Wasabi, 82nd St.
Bonefish Grill	Detour	La Margarita	On the Border	Seasons 52	Wendy's
Bravo	Dirty Franks Hot Dogs, Columbus, OH	La Piedad Mexican, Broad Ripple	Oobatz	Shapiro's	When Harry Met Salad

Table 11: Remaining Restaurants (cont.)

Restaurants Requested					
Broken Egg	Divvy, Carmel	Lafayette Brewing Company	Original Pancake House	Shiraz Wine Bar	White Fence Farm
Bru Burger	Dunkin' Donuts	Late Harvest	Outback	Siam Square, Virginia Ave.	Whole Foods Market
Brugge Brasserie	Eddy Merlots	Le Chateau des Alpilles,	P.F. Chang's	Sobro Café, Broad Ripple	Wild Ginger

		St. Remy de Provence			
Bruggers Bagels	Einstein Bagels	Le Peep	Palomino's	SoHo Coffee Shop, Carmel	Wings Etc.
Bruncies	Famous Dave's BBQ	Libertine Liquor Bar	Patricks	Some Guy's Pizza	Woody's Library, Carmel
Buca di Beppo	Fazolis	Lone Star	Pei Wei	Sonic	Zest, Broad Ripple
Buffalo Wild Wings	Fire, Broad Ripple	Long John Silver's	Penn Station East Coast Subs	Soup Plantation	Zoe's Kitchen, Dallas, TX
Burger King	Firehouse Subs	Long's Bakery	Pearl Bistro	Spice Nation	Zoup

Question 4: Observations

- Local ownership with multiple locations and concepts, such as Patachou, Inc., represent opportunities for the study area.
- As with the restaurant format results, this list includes all formats, price points, and food categories.
- Responses to this question included ten (10) responses each for ‘no chains’ and requesting outdoor dining.

Question 5: In an average month, how many times do you make a purchase in these commercial areas?

This question details the respondents' shopping frequency for the same commercial districts noted in Question 1.

Table 12: Full Sample Responses

In an average month, how many times do you make a purchase in these commercial areas?

Answer Options	Never	3 or fewer times per month	Weekly	A few times per week	Daily	Response Count
Downtown Zionsville	175	526	118	25	4	848
Downtown Carmel	579	236	23	3	0	841
Michigan Road corridor	31	231	367	200	19	848
Clay Terrace, Carmel	299	482	46	12	1	840
Hamilton Crossing area, Carmel	740	92	6	1	0	839
Boone Village area, Zionsville	84	288	265	181	26	844
Anson Marketplace	352	370	79	34	4	839
Traders Point area, Indianapolis	174	523	115	27	2	841
Castleton/Keystone area	285	497	50	8	1	841
Downtown Indianapolis	493	303	28	11	2	837
Other (please specify)						36
					answered question	**851**
					skipped question	**50**

Illustration 4: Full Sample Rankings for Purchasing At Least Weekly

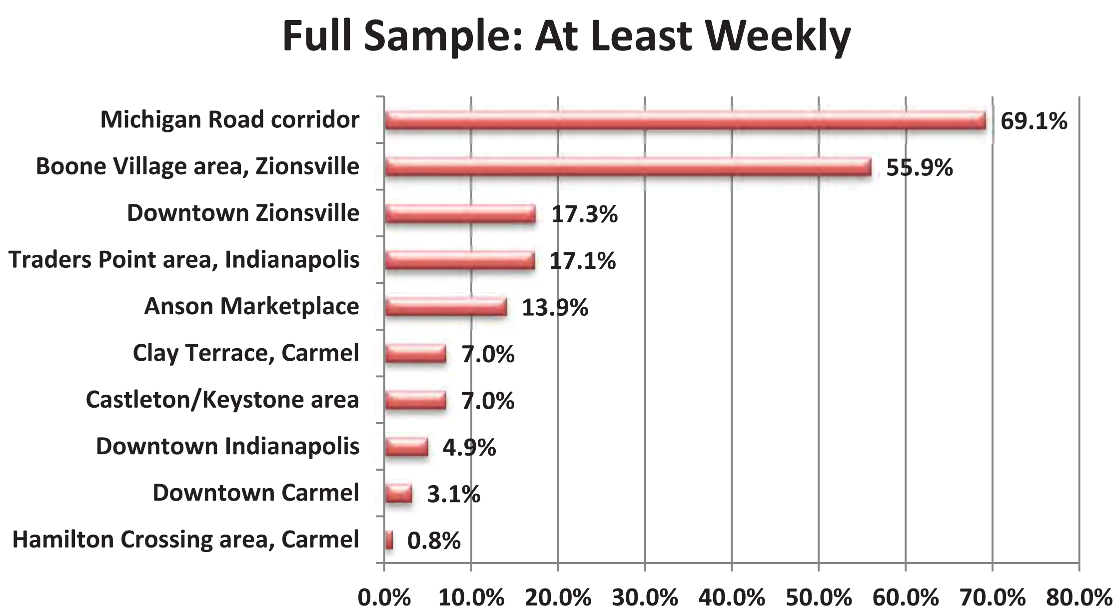


Table 13: Full Sample and Sub-Group Responses

Shop at Least Weekly	Full Sample	Long Time Residents	Newer Residents	35-44	Never Shop DT
Downtown Zionsville	17.3%	18.2%	16.7%	17.1%	0.0%
Downtown Carmel	3.1%	2.7%	2.6%	2.4%	4.6%
Michigan Road corridor	69.1%	70.1%	74.5%	75.8%	68.0%
Clay Terrace, Carmel	7.0%	6.3%	0.0%	7.6%	9.8%
Hamilton Crossing area, Carmel	0.8%	1.1%	0.0%	0.4%	1.8%
Boone Village area, Zionsville	55.9%	64.6%	41.9%	55.2%	37.4%
Anson Marketplace	13.9%	14.5%	14.1%	14.7%	17.2%
Traders Point area, Indianapolis	17.1%	17.3%	19.5%	19.1%	19.1%
Castleton/Keystone area	7.0%	6.5%	6.8%	6.0%	14.5%
Downtown Indianapolis	4.9%	5.1%	5.3%	7.3%	5.8%

Question 5: Observations

- Long-time residents shop downtown with slightly greater frequency than newer residents.
- Residents are patronizing Zionsville's retail areas frequently, shopping their community.
- The Never Shop Downtown sub-group shops more frequently at traditional shopping malls.

Question 6: When shopping in Downtown Zionsville, how often do you:

This question asks respondents to describe how they use downtown Zionsville by characterizing their shopping trips.

Table 14: Full Sample Responses

When shopping in Downtown Zionsville, how often do you:

Answer Options	Never	A few times each year	Monthly	Weekly	A few times each week	Daily	Response Count
Quickly enter a store, make a purchase, and end your shopping trip	223	342	169	76	25	2	837
Visit multiple businesses with a plan to purchase specific items as quickly as possible	358	310	114	41	9	1	833
Leisurely shop and dine for less than 2 hours	257	398	139	32	9	0	835
Leisurely shop and dine for more than 2 hours	444	296	78	10	3	0	831
Visit with guests from another community	288	450	83	14	0	1	836
answered question							**847**
skipped question							**54**

Table 15: Full Sample Visits

When Shopping	At Least Monthly	Never
Quickly enter a store, make a purchase, and end your shopping trip	32.5%	26.6%
Visit multiple businesses with a plan to purchase specific items as quickly as possible	19.8%	43.0%
Leisurely shop and dine for less than 2 hours	21.6%	30.8%
Leisurely shop and dine for more than 2 hours	11.0%	53.4%
Visit with guests from another community	11.7%	34.4%

Question 6: Observations

53.4% of respondents never shop or dine for over 2 hours and 34.4% never visit with guests. Developing even greater community identification with the study and enhancing the mix present opportunities to extend visits and purchasing.

Question 7: How would the addition of or more of these stores affect the amount that you spend in Downtown Zionsville?

This question includes a list of business types where respondents indicate how much they would spend, assuming a new store or a similar store, in the study area. This question provides information on the most desirable categories of new tenants. The analysis examines the categories where respondents indicated that they would spend a little more or a lot more, assuming that business category was added to downtown Zionsville. It also provides insight on retention of existing tenants. The first table shows the responses from the full sample. The subsequent illustration below sorts the responses from the most likely to the least likely to attract greater spending. The second table includes the ratings for the full sample and all sub-groups. This list of business types was random for each respondent while the survey was open so that the list order would not impact the results.

Table 16: Full Sample Responses

How would the addition of or more of these stores affect the amount that you spend in Downtown Zionsville?

Answer Options	I would spend a lot more	I would spend a little more	No change	I do not know	Response Count
Antiques	32	129	639	15	815
Appliances/Electronics	24	105	653	30	812
Art Gallery	18	54	718	20	810
Arts/Craft/Knitting/Sewing Supplies	53	145	588	28	814
Bakery	147	396	260	13	816
Bicycle Shop	70	251	468	29	818
Books	103	262	442	16	823
Specialty Foods (Prepared or Ethnic)	209	389	203	20	821
Grocer	233	301	267	22	823
Hardware	25	146	625	21	817
Home Accessories	99	355	340	24	818
Furniture	43	204	534	28	809
Shoes	92	283	420	21	816
Pharmacy/Drug Store	64	190	536	23	813
Fine Jewelry	14	39	740	19	812
Women's Apparel	121	293	379	26	819
Men's Apparel	51	246	493	27	817
Children's Apparel	53	155	574	31	813
Pet Supplies	47	181	568	21	817
Make-up/Cosmetics	44	175	570	22	811
Gardening Supplies	46	228	519	22	815
Florist	30	229	533	22	814
Sporting Goods	57	276	462	21	816
Fine Wine & Spirits	65	177	551	21	814
Greeting Cards/Gifts/Collectibles	91	282	422	21	816
Ice Cream/Candy	116	378	299	24	817
Other (please specify)					78
				answered question	**835**
				skipped question	**66**

Illustration 5: Full Sample Rankings of Business Categories

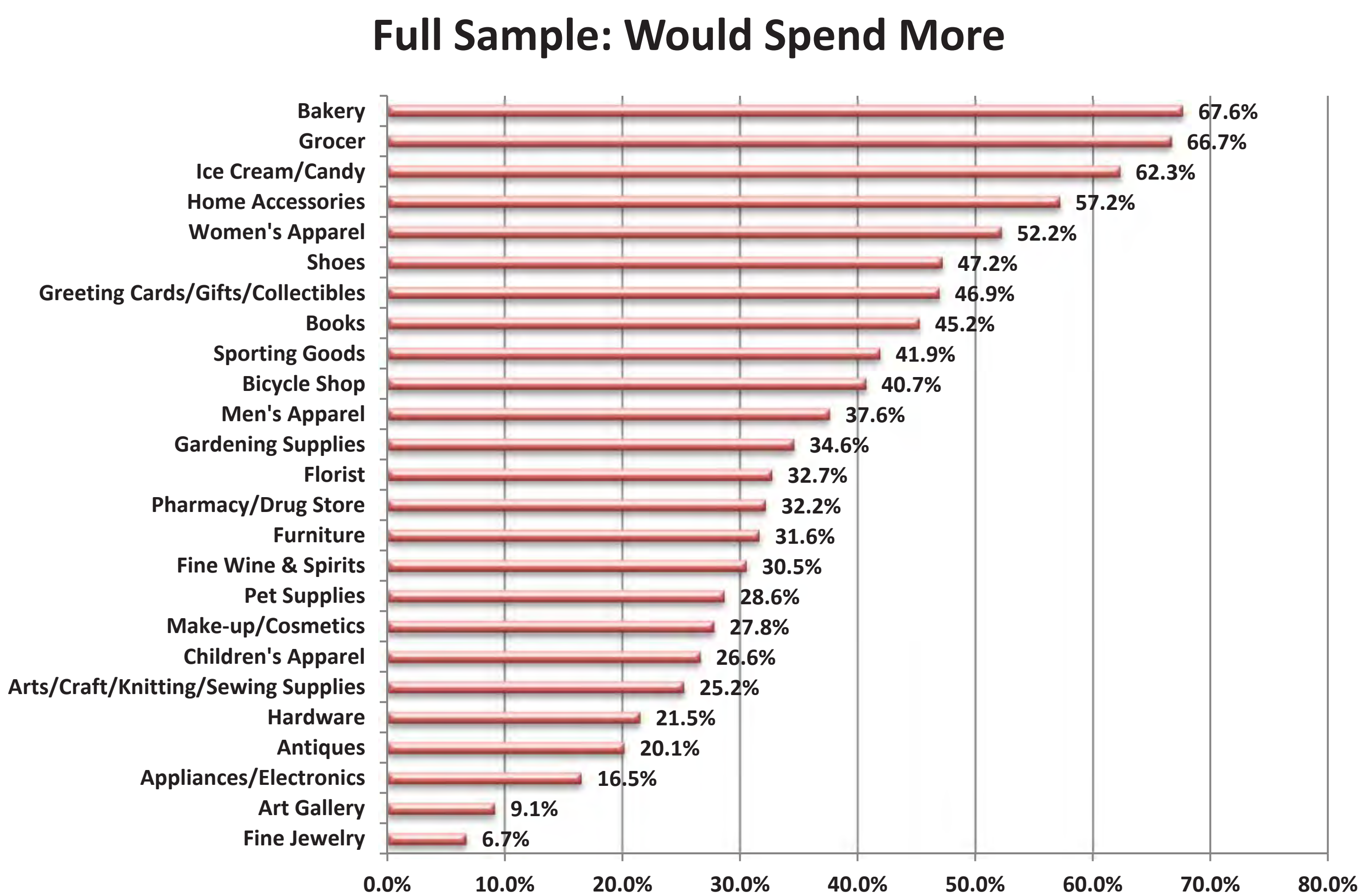


Table 17: Full Sample and Sub-Groups Responses

Would Spend More on:	Full Sample	Long Time Residents	Newer Residents	35-44	Never Shop DT
Antiques	20.1%	18.6%	22.7%	15.7%	18.6%
Appliances/Electronics	16.5%	19.2%	9.8%	17.2%	19.6%
Art Gallery	9.1%	9.1%	7.0%	7.5%	8.1%
Arts/Craft/Knitting/Sewing Supplies	25.2%	23.1%	28.8%	25.8%	23.6%
Bakery	67.6%	66.0%	72.7%	68.7%	67.3%
Bicycle Shop	40.7%	41.9%	40.5%	42.5%	31.8%
Books	45.2%	47.3%	40.1%	48.6%	35.0%
Specialty Foods (Prepared or Ethnic)	74.7%	76.4%	75.1%	74.4%	65.2%
Grocer	66.7%	66.0%	72.1%	69.9%	63.5%
Hardware	21.5%	21.2%	21.6%	21.5%	20.6%
Home Accessories	57.2%	57.2%	58.9%	59.7%	45.7%
Furniture	31.6%	32.6%	30.8%	36.8%	22.6%
Shoes	47.2%	46.9%	51.1%	51.6%	40.0%
Pharmacy/Drug Store	32.2%	30.9%	34.4%	34.4%	32.1%
Fine Jewelry	6.7%	6.6%	5.9%	6.9%	8.1%
Women's Apparel	52.2%	51.6%	55.9%	55.7%	36.7%
Men's Apparel	37.6%	39.0%	33.5%	39.9%	27.3%
Children's Apparel	26.6%	20.7%	44.9%	44.4%	23.1%
Pet Supplies	28.6%	27.3%	34.2%	29.5%	33.8%
Make-up/Cosmetics	27.8%	27.9%	31.1%	34.3%	21.4%
Gardening Supplies	34.6%	36.3%	31.0%	34.4%	26.4%
Florist	32.7%	31.8%	37.5%	33.1%	29.2%
Sporting Goods	41.9%	42.3%	43.0%	50.8%	38.8%
Fine Wine & Spirits	30.5%	26.9%	39.1%	35.8%	27.9%
Greeting Cards/Gifts/Collectibles	46.9%	49.2%	45.4%	50.0%	36.5%
Ice Cream/Candy	62.3%	60.5%	69.1%	72.7%	59.9%

Question 7: Observations

- The lower ratings for the Never Shop Downtown sub-groups reflect a lack of familiarity with the downtown business offering.
- Food-related categories, particularly prepared foods of all types, are highly rated.

- Shoes, children's apparel and sporting goods are highly rated by Newer Residents and 35-44 sub-groups.

Question 8: In the past month, what have you purchased elsewhere that you wish you could have bought in Downtown Zionsville?

This question provides information useful to existing and potential downtown businesses in tailoring their offering to include those items or categories desired by respondents. There were approximately 911 individual responses to this question. Seventeen (17) respondents indicated that no purchases were made within the last month.

Table 18: Full Sample Purchase Categories

Purchases	#
Apparel-Women's, Men's and Children's	151
Specialty Groceries (Specialty, Organic, or Ethnic)	98
Groceries	67
Housewares and Home Décor	58
Gifts and Cards	56
Athletic Wear/Equipment	37
Women's Accessories and Cosmetics	32
Baked Goods	28
Household Items	27
Books and Music	24
Shoes	24
Pet Food and Supplies	23
Cycling-Related	19
Ice Cream	19
Arts and Crafts	18
Wine, Beer and Spirits	15
Electronics and Photography	14
Supplements	14
Outdoor and Garden	13

Question 8: Observations

- Apparel responses were virtually even for each type of apparel.
- Several highly rated categories generally match footprints for lease space in downtown Zionsville.

Question 9: Please provide the name of the store where you made that purchase.

This question provides a list of potential retail recruitment targets. Table 19 lists those stores noted most often by survey respondents. Online shopping is an important factor in these survey responses, as it is in similar communities. If the respondent provided a store location, it is included in the following tables.

Table 19: Most Patronized Retailers

Stores Most Patronized	
Whole Foods Market	61
Target/Super Target	46
Traders Joes	33
Online (All)	30
Kohls	26
Nordstrom	25
Marsh	24
Tangerine Cards & Gifts, Noblesville and Carmel	22
Dicks Sporting Goods	19
Fresh Market	14
Home Goods	14
Petsmart/Petco	14
None	12
Costco	11
Barnes & Noble	11

Table 20: Remaining Stores

Stores Requested					
A1 Cyclery	Carson's	Forever 21	Jeni's Ice Cream, Columbus OH and elsewhere	Old Navy	Tate's, Broad Ripple
Abercrombie	Carters	Game Stop	JoAnn's Fabics	Once Upon a Child	Taylor's Bakery
Accent Shop	Charming Charlie	Gander Mountain	Joe's Butcher Shop, Carmel	Orange Leaf, Carmel	Tea Buds
Ace	Cheese Shop	Gap	John Kirk	Palmer Kelly Floral Designs	Three Dog Bakery
Agrarian	Chelsea's, Broad Ripple	Gap Kids	Jos A Bank	Paneria Bakery	TJ Maxx
Aldi	Chico's	Gears Up Cyclery, Plainfield	Karisma, Noblesville	Party City	Tobacco Store
All Good Things, Madison	Children's Place	Girly Chic Boutique, Broad Ripple	Kerns Automotive	Payless LIquor	Tommy Bahama
Amber	Clark's	GNC	Kirk Furniture	Penzey's Spices	Tractor Supply
American Eagle	Claus' (Klemm's) Meat Market, Indianapolis	Goodman's	Kittle's	Performance Bicycle	Traders Point Creamery
Amish Furniture	Clock Tower, Holland MI	Goodwill	Kroger	Pier 1	Tuesday Morning
Ann Taylor	Colby Palmer, Fresh Market	Goody's, Lebanon	Lane Bryant	Pottery Barn	Twisted Sister
Ann Taylor Loft	color me mine	Goose the Market, Indianapolis	Lego Store	Radio Shack	Uber, Indianapolis
Anthropologie	Consignment Shop	Gray Brothers, Mooresville	LL Bean	Ralph Lauren	Ulta

Table 20: Remaining Stores (cont.)

Stores Requested					
Apple Store	Container Store	Great Fermentations	Lowes	REI	Vine & Table Market,

					Carmel
Arhaus Furniture	Copper Creek Canyon	Gretels, West Lafayette	Lucky B Boutique, Broad Ripple	Rene's Bakery	Vitians Upholstery, Indianapolis
Artisano's	Crate & Barrel	Guitar Center	Lululemon	ReStyled	Von Maur
Ashley Furniture	Crazy 8	Gymboree	Macy's	Roberts Photo & Video	Vons Book Store, West Lafayette
Athleta	Crimson Tate	H & M	maggie moo's	Rockler	W Foods
Athletic Annex	Crown Liquors	H H Gregg	Marathon	Room & Board, Chicago	Walgreen's
Banana Republic	CVS	Half Price Books	Marigold	Roomplace	West Elm
Baskin Robbins	Cycle Outfitters	Hallmark	Marsh	Runners Forum	White House Black Market
Bass Pro	Delaney's	Hancock Fabrics	Marshalls	Rusted Moon	Wild Birds Unlimited
Bath & Body Works	Delia's	Handels	Mass Ave Wine Shop, Indianapolis	Saks FIfth Avenue	Williams Sonoma
Bed Bath and Beyond	Dollar Tree	Haverty's	Matthews Bicycle Shop	Sam's Club	Windsor Jewelry, Indianapolis
Best Buy	Donut Den and Bakery	Heathcliff's, Crawfordsville	Meijer	Saraga International Market, Indianapolis	World Market
Bicycle Garage Indy	DSW	Hoaglin To Go, Mass Avenue	Men's Warehouse	Sears	World Market
Big Hat Books	Duncan Fireplace & Patio, West 38th Street	Hobby Lobby	Michael's	Secret Ingredient, Indianapolis	Yo Joy Frozen Yogurt, Multiple Locations
Big Lots	Earth Fare	Hollister	Moody Meats	Sephora	zgalleries

Table 20: Remaining Stores (cont.)

Stores Requested					
Bike Line, Carmel and Broad Ripple	Eddie Bauer	Home Depot	My Sugar Pie	Shapiro's Deli, Indianapolis	
Books a Million	Eileen Fisher	Hot Mama	Nebo Ridge Bicycles	Specks, Brownsburg	

Brooks Brothers	Emery's	Hot Topic	New Age People, 86th Street	Speedway, Multiple Locations	
buy buy baby	Englin's	Huddles	New York and Company	Staples	
C Wonder	Ethan Allen	Indy UpCycle, Broad Ripple	Noblesville Honda	Stein Mart	
Candle Factory, Columbus, OH	Express	J Jill	Oberweis	Stihl Dealer, Lebanon	
Carmel Antique Mall	Felicia	J. Crew	Ocean World	Stride Rite	
Carmel Cyclery	Ferrari, Chicago	Jayson Home, Chicago	Office Depot	Sur La Table	
	footlocker	JB and Me, Holland, MI	Office Max	Talbot's	
		JC Penney			

Question 9: Observations

- Tangerine Gifts, multiple bike shops, and several stores in West Lafayette and other Indianapolis neighborhoods received multiple mentions.
- The most patronized list, as in most, communities is primarily composed on national or regional format retailers.

Question 10: Please rate your overall satisfaction with these factors as they apply to Downtown Zionsville:

This question provides general guidance about the overall downtown Zionsville experience. Excellent and Above Average ratings were combined to calculate the ratings for each factor, except for Parking Convenience and Traffic Flow. The rankings for these two factors included Average ratings, as the cost of having and maintaining 'Excellent or Above Average' parking would be prohibitive for any community.

Table 21: Full Sample

Please rate your overall satisfaction with these factors as they apply to Downtown Zionsville:

Answer Options	Excellent	Above average	Average	Below average	Awful	I don't know	Response Count
General attractiveness	272	381	106	31	4	2	796
Building appearance	171	388	175	47	8	1	790
Cleanliness of streets and sidewalks	268	386	111	18	11	1	795
Street lighting	93	247	361	41	10	39	791
Friendliness of employees	198	329	191	42	9	26	795
Knowledge of employees	140	329	225	14	1	83	792
Merchandise displays	119	315	273	41	1	44	793
Quality of goods available	124	333	243	60	13	20	793
Variety of goods available	23	59	250	352	90	11	785
Interior appearance of the businesses	157	325	248	42	4	20	796
Traffic flow	41	155	357	174	58	8	793
General safety	353	290	119	24	4	7	797
Bicycle access	127	189	213	105	23	125	782
Pedestrian access	182	329	215	45	9	6	786
Pedestrian safety	173	311	231	54	13	7	789
Store hours	31	95	287	259	104	18	794
Parking convenience	57	195	324	161	55	7	799
Other (please specify)							60
						answered question	**799**
						skipped question	**102**

Illustration 6: Full Sample Rankings (The aqua colored rankings are downtown merchant controlled factors.)

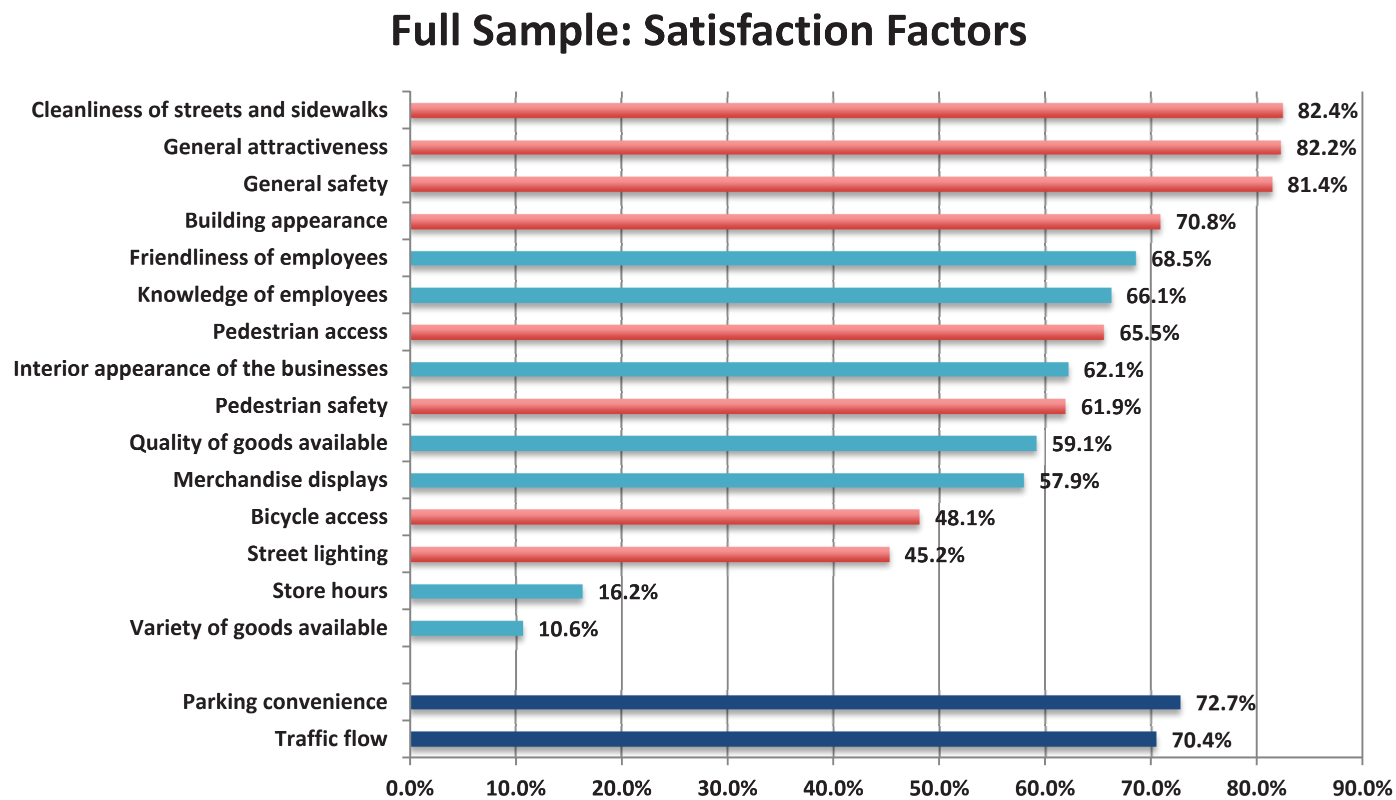


Table 22: Full Sample and Sub-Group Rankings

Satisfaction Factor	Full Sample	Long Time Residents	Newer Residents	35-44	Never Shop DT
General attractiveness	82.2%	81.5%	84.7%	82.8%	75.5%
Building appearance	70.8%	69.3%	74.7%	68.0%	64.4%
Cleanliness of streets and sidewalks	82.4%	79.9%	89.0%	83.6%	80.0%
Street lighting	45.2%	47.5%	37.8%	46.8%	43.2%
Friendliness of employees	68.5%	68.0%	70.7%	63.3%	62.8%
Knowledge of employees	66.1%	68.2%	61.8%	66.5%	56.2%
Merchandise displays	57.9%	59.4%	54.5%	57.9%	43.1%
Quality of goods available	59.1%	58.2%	61.7%	59.9%	49.7%
Variety of goods available	10.6%	10.5%	10.2%	10.6%	7.2%
Interior appearance of the businesses	62.1%	61.7%	62.6%	63.2%	53.4%
General safety	81.4%	80.0%	85.9%	85.1%	77.8%
Bicycle access	48.1%	49.0%	47.6%	46.6%	41.5%
Pedestrian access	65.5%	64.7%	68.8%	64.0%	58.7%
Pedestrian safety	61.9%	61.1%	63.8%	60.2%	58.7%
Store hours	16.2%	16.2%	14.2%	15.7%	16.8%
Parking convenience (Average or better)	72.7%	70.3%	82.2%	72.5%	69.0%
Traffic flow (Average or better)	70.4%	68.6%	76.7%	73.1%	65.6%

Question 10: Observations

- The lowest ratings for merchant controlled factors--store hours and variety of goods available.
- Lower ratings for bike access may represent an opportunity to increase access to the study area from elsewhere in Zionsville.
- Street lighting ratings may represent a future capital improvement.
- Parking and traffic flow are ranked much higher by Newer Residents.

Question 11: When is it convenient for you to shop? (Mark all that apply)

This question seeks to clarify the optimal hours of operation for downtown's retailers, based upon when respondents shop.

Table 23: Full Sample and Sub-Groups (Weekend times are noted in red.)

Convenient Shopping Times	Full Sample	Long Time Residents	Newer Residents	35-44	Never Shop DT
Morning (7AM-10AM)	19.4%	18.4%	21.6%	17.1%	14.3%
Daytime (10AM-5PM)	43.2%	44.6%	39.5%	43.4%	39.8%
Early Evening (5PM-7PM)	58.7%	60.8%	54.2%	57.0%	46.6%
Evening (After 7PM)	49.9%	48.3%	56.8%	52.6%	47.8%
Saturday	78.5%	77.2%	86.3%	80.1%	70.8%
Sunday	68.1%	66.1%	78.4%	72.9%	66.5%

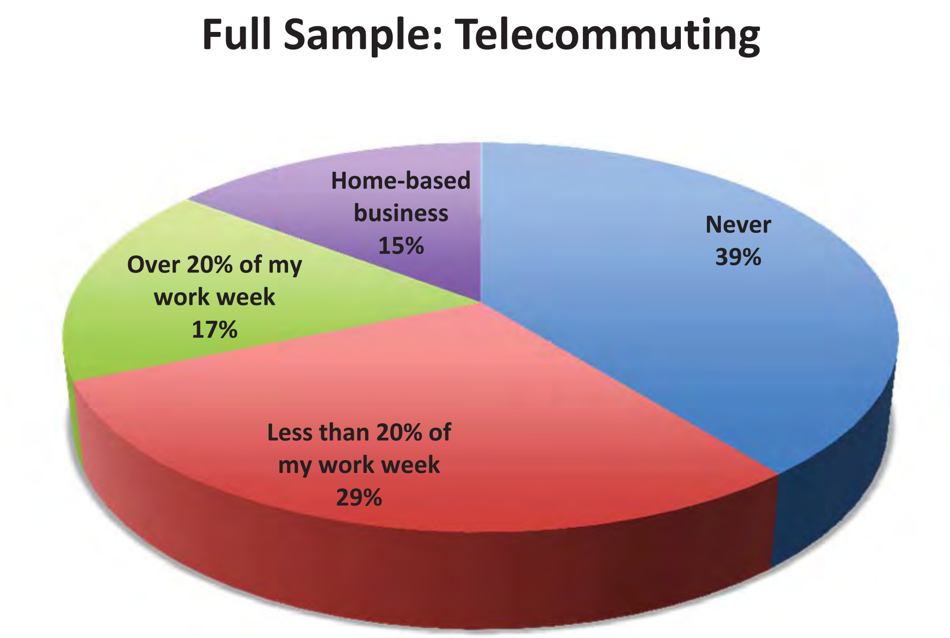
Question 11: Observations

- These responses, combined with respondents' low satisfaction with store hours, indicate that downtown retailers need to be open when customers can shop, including Sunday. Hours were also noted as an issue by respondents in the written comments to the survey.
- Evening hours should also be explored.
- Merchant commitment to longer hours will require more than a short trial period and significant promotion to alter consumer habits.

Question 12: If you are employed, how frequently do you work from home rather than from your office?

This question seeks to identify an additional daytime population to aid in future recruitment and programming. This population would work from home at least one day or more during the work week.

Illustration 7: Full Sample Telecommuting



Question 12: Observations

- Respondent results were uniform across all sample groups.
- Activities for home-based businesses may represent a programming opportunity for the Chamber and for identifying downtown entrepreneurs.

Questions 13 through 17: Downtown Parking Preferences

This series of questions asked respondents to identify parking preferences based upon their experiences parking in downtown Zionsville, primarily in the Village. The results shown for each question are for the full sample. There was minimal variation among the survey sub-groups in their responses to each of these five (5) questions.

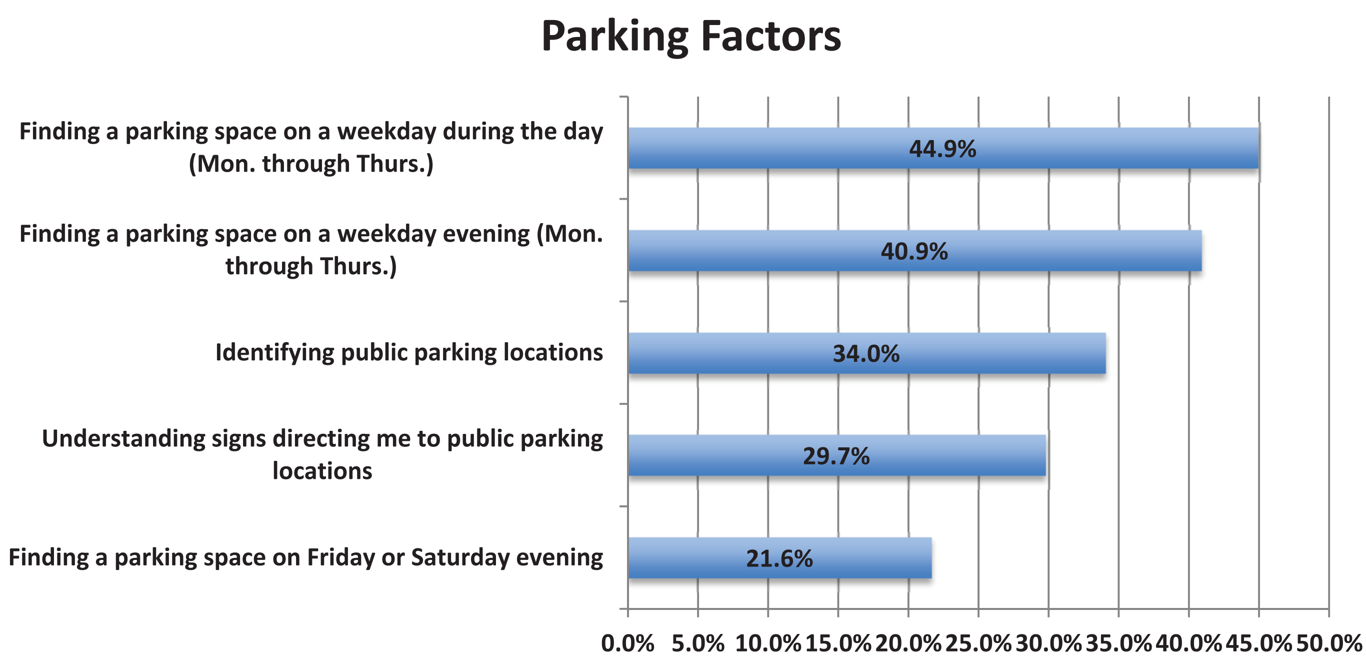
Question 13: Please rate the following parking factors based upon your most recent visits to Downtown Zionsville.

Table 24: Full Sample

Please rate the following parking factors based upon your most recent visits to Downtown Zionsville.

Answer Options	Excellent	Above average	Average	Below average	Awful	I don't know	Response Count
Finding a parking space on a weekday during the day (Mon. through Thurs.)	111	194	269	77	28	114	793
Finding a parking space on a weekday evening (Mon. through Thurs.)	80	209	322	74	22	89	796
Finding a parking space on Friday or Saturday evening	42	111	289	185	80	86	793
Identifying public parking locations	81	177	334	135	32	34	793
Understanding signs directing me to public parking locations	61	148	304	154	36	89	792
						answered question	**797**
						skipped question	**104**

Illustration 8: Full Sample Parking Factors



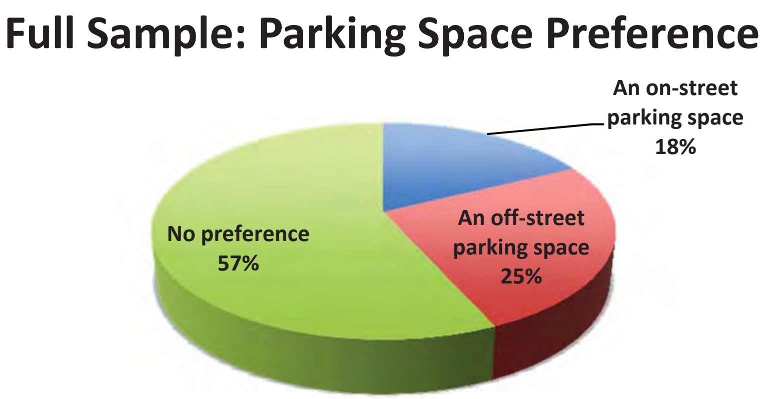
Question 14: Do you typically park in a private parking lot or use public parking?

Table 25: Full Sample Parking Lot

Private or Public Lots	
Private Lot	5.7%
Public (On-street or Off-street)	94.3%

Question 15: Do you prefer to park in?

Illustration 9: Full Sample Parking Space



Question 16: How long is your typical visit to Downtown Zionsville?

This question reflects the results in Question 6 asking respondents to characterize their visits to downtown Zionsville, with 86.2% of visits lasting under 2 hours.

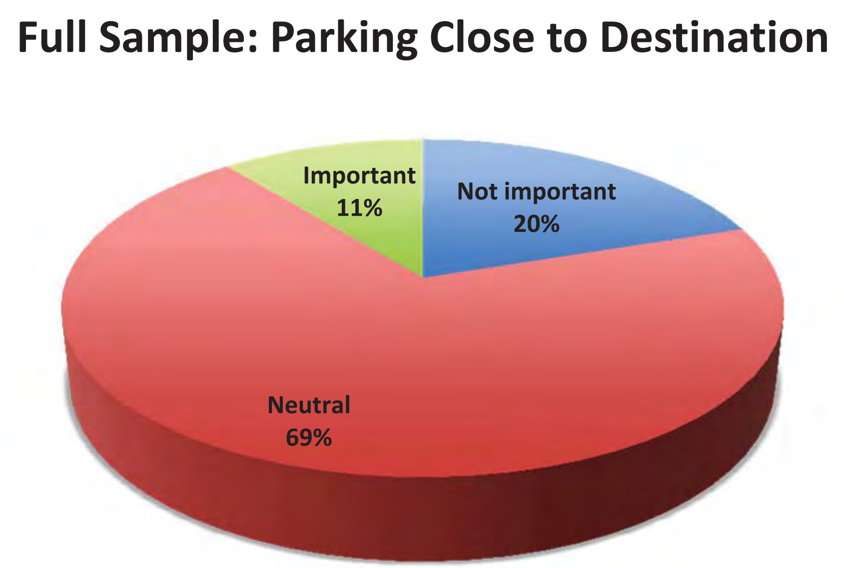
Table 26: Full Sample

How long is your typical visit to Downtown Zionsville?

Answer Options	Response Percent	Response Count
Less than 30 minutes	9.1%	72
30 minutes to 1 hour	31.1%	247
1 to 2 hours	46.2%	366
2 to 3 hours	9.7%	77
3 to 4 hours	1.3%	10
Greater than 4 hours	2.6%	21
	answered question	**793**
	skipped question	**108**

Question 17: While we all prefer to park close, how important is it to you to park close to your primary destination in Downtown Zionsville?

Illustration 10: Full Sample Parking Close



Questions 18-22: Detail about Respondents

Questions 18-22 were used to describe the characteristics of the respondents. All tables and illustrations shown are for the full sample.

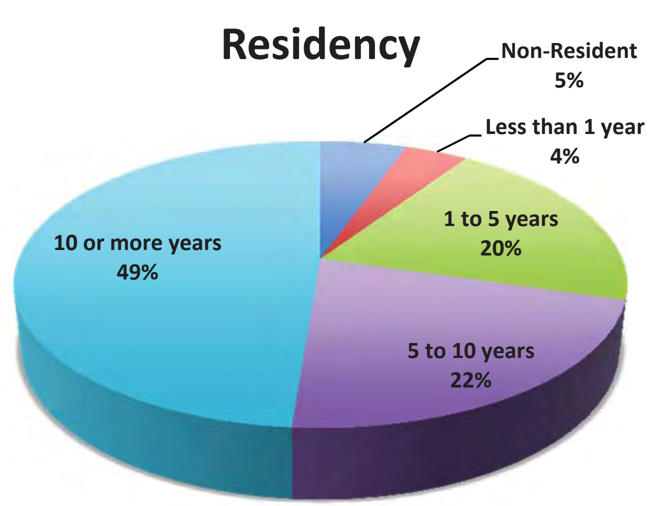
Question 18: How long have you lived in Zionsville?

Table 27: Full Sample Residency

How long have you lived in Zionsville?

Answer Options	Response Percent	Response Count
I do not live in Zionsville	5.4%	43
Less than 1 year	4.0%	32
1 to 5 years	20.2%	161
5 to 10 years	21.7%	173
10 or more years	48.8%	390
	answered question	**799**
	skipped question	**102**

Illustration 11: Residency



Question 19: What is your zip code? (Please enter your 5-digit zip code.)

Table 28: Full Sample Zip Codes

Respondents Zip Codes			
46032	7	46140	1
46033	3	46147	1
46037	1	46167	1
46038	2	46208	1
46052	3	46220	1
46064	1	46224	1
46069	3	46236	1
46071	1	46240	1
46074	4	46254	3
46075	17	46260	2
46077	730	46268	4
46078	1	46278	1
46112	1	47905	1
46123	2	47909	1

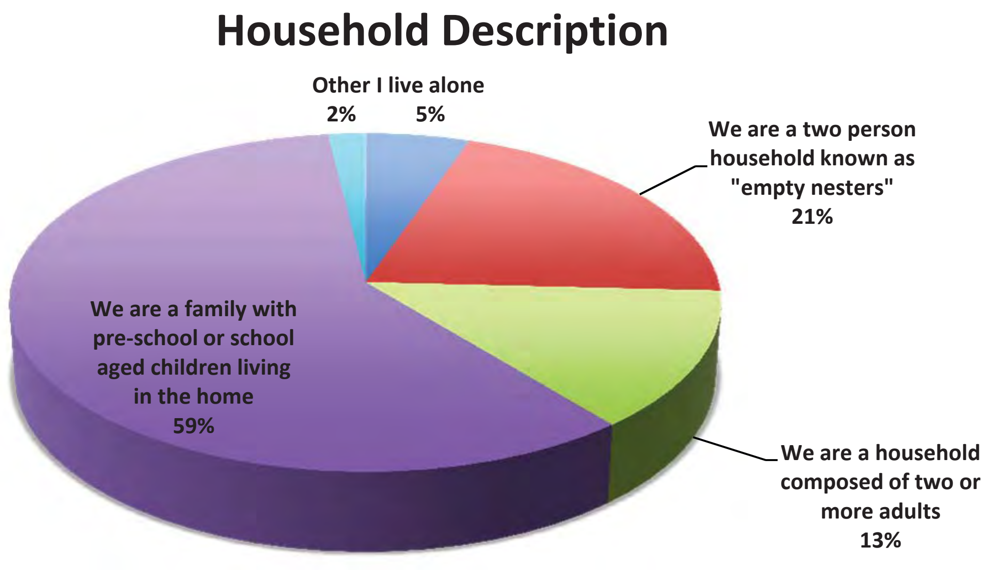
Question 20: Choose the answer that best describes your household.

Table 29: Full Sample Household Description

Choose the answer that best describes your household.

Answer Options	Response Percent	Response Count
I live alone	5.3%	42
We are a two person household known as "empty nesters"	20.5%	163
We are a household composed of two or more adults	13.3%	106
We are a family with pre-school or school aged children living in the home	59.0%	469
Other	1.9%	15
	answered question	**795**
	skipped question	**106**

Illustration 12: Household Description

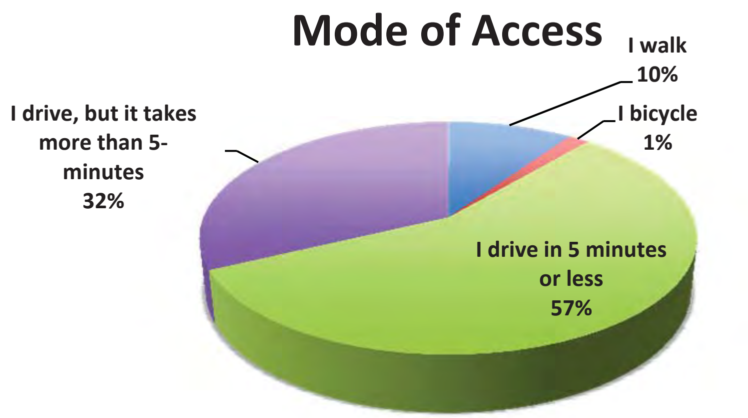


Question 21: Please choose the category that best describes how you usually travel to Downtown Zionsville to shop and dine.

Table 30: Full Sample Mode of Access to Downtown

Please choose the category that best describes how you usually travel to Downtown Zionsville to shop and dine.		
Answer Options	**Response Percent**	**Response Count**
I walk	9.6%	77
I bicycle	1.6%	13
I drive in 5 minutes or less	56.6%	452
I drive, but it takes more than 5-minutes	32.1%	256
	answered question	**798**
	skipped question	**103**

Illustration 13: Full Sample Mode of Access



Question 22: Please choose the category that matches your age.

Table 31: Full Sample Age Categories

Please choose the category that matches your age.		
Answer Options	**Response Percent**	**Response Count**
Under 20	0.1%	1
20 to 24	1.1%	9
25 to 34	10.7%	85
35 to 44	31.6%	252
45 to 54	31.1%	248
55 to 64	16.6%	132
65 to 74	7.4%	59
75 or older	1.4%	11
	answered question	**797**
	skipped question	**104**

Table 32: Full Sample Compared with U. S. Census Bureau Data

Age Comparison		
	Survey Respondents	**U. S. Census Data**
Under 20	0.1%	33.7%
20 to 24	1.1%	2.5%
25 to 34	10.7%	7.7%
35 to 44	31.6%	15.5%
45 to 54	31.1%	18.7%
55 to 64	16.6%	10.9%
65 to 74	7.4%	5.3%
75 or older	1.4%	5.6%

Question 23: Any additional comments you wish to provide about Downtown Zionsville?

Respondents provided the following comments for this Zionsville Consumer Survey. These comments are unedited, and 42.3% of respondents took time to write a comment. (This is the highest percentage of comments received to date from any respondent pool in BDI's previous consumer surveys.) Question 24 asked respondents to provide contact information to obtain information about both this survey and the overall study results. 243 respondents provided names, phone numbers, and email addresses. This contact information has been provided under separate cover to Town of Zionsville staff.

1) The town needs shops that sell thing you need at least once a month. More wine guys and less antique stores

2) Outlaw any and all Democrats younger than 30 and make the 'Farm' a reality and don't let the provincial old towners drown out positive progress.

3) Improve infrastructure to support more restaurants.

4) make it better

5) I would prefer there to be more shopping options that are not necessarily "high end," and more practical, everyday items like you would get at a grocery store or drug store.

6) While I appreciate the need to diversify our tax base, I sincerely hope the economic development commission is keeping in mind that most people in Zionsville do not want to live in Carmel or Fishers. I'm already disappointed with the mix of businesses I see popping up in the Village expansion as well as Anson. We do not need more dry cleaners, sub sandwiches, or pizza joints. I also worry that the commission has talked itself into believing it can somehow reclaim the sales lost to big box retailers and Amazon. It's not coming back and we need to figure out how to

complement stores like Costco, Dick's Sporting Goods, Target, and Best Buy with unique and high-end retail. I detest Walmart, and will never shop there. And I hope we keep them out of Zionsville forever. But that doesn't mean I am looking to do the bulk of my household shopping on Main Street. That's a location best suited for things like good coffee, unique restaurants, music instrument stores, wine, etc.

7) More Restaurants!! Both fine dining and family. Take advantage of outdoor space for seating.

8) look at long term planning for traffic -- not only in business area but how you go in and out---OAK Street-Ford Rd

9) I miss gift and clothing shops and think people came downtown more when there was a small grocery.

10) Where the Citgo was iffy would build a Dunkin Donuts it would be a Gold Mine leaving town for work.

11) We love living here and are proud of the way Downtown looks (except for the empty gas station lot, but that's being taken care of). Too many banks.

12) Get rid of the cars and turn the Brick Street into pedestrians only

13) Don't make us into Carmel! Keep the small town that we are that makes us unique and improve on what we have! More is not always better.

14) Downtown needs more variety (i.e. no additional art galleries or antique stores). Small chain stores that do not compete with existing merchants would be nice (Gap, Jimmy Johns, Chipotle, Nike outlet, Bath and Body Works, etc.)

15) I really like the new sidewalks. I have had some difficulty walking on them with a double stroller. Having smoother and wider sidewalk is always nice for a family stroll.

16) I love it! Concerned about parking and traffic mess daily because of 106th and Main St. development

17) Keep it classy and family-friendly. We don't need to pave over green spaces or nice old buildings to create parking. We just need to add a few quality businesses that are consistent with the Village theme.

18) We do enjoy the events and street fairs that occur downtown also.

19) We love Zionsville and appreciate that input is wanted and considered!

20) brick street needs constant cleaning as well as the sidewalks

21) I love it but wish we had a greater variety of stores! (And better parking, of course!)

22) A lovely place to dine and visit for an afternoon alone or with friends.

23) Zionsville needs to come out from the under the "dome" and recognize the world around it.

24) I like Zionsville

25) Avoid big box store and chain restaurants. Keep the town small, authentic and unique. Zionsville

shouldn't try and be Carmel

26) No real family friendly places to eat. Antiques are not my thing. Not much of interest or need in downtown although it looks nice, but so yesterday and not vibrant. Looks like a place for retirees.

27) It is charming but dated. We still find it attractive but want it to give us a better reason to spend our money there and also entertain there. We have lived here just short of five years and there has been a fair amount of turnover downtown, and we know this is more than the economy being sluggish.

28) Need more convenient parking. Need improved traffic flow.

29) Recommend adding small increment to annual town budget to further improve appearance - it's an already attractive place that could be really impressive with a few improvements

30) I would love us to have a great breakfast place- like Bub's Cafe' or Yolk (Chicago)

31) I love living in Zionsville.

32) Restaurants are the biggest draw for us. I hope we can adequately support them so they stay in the village!

33) bring back a pharmacy, small grocery, and a "real" bakery (that makes bread)

34) Love The Friendly but would also like the option of a nicer casual alternative pub/dining experience.

35) More boutique variety in both shopping and food. The one-way streets and curb-planters are hideous and not kept.

36) Hours M-S 10-6 and Sunday 12-5. Sunday hours are a must!

37) No more real estate offices, hair salons or banks in the village

38) It needs to have an identity now that so many art galleries have closed.

39) There are several poor quality buildings in Downtown that detract from its appearance. Use Holland, Michigan as an example of an excellent downtown both in appearance and offerings.

40) I love downtown Zionsville, but I do feel that certain businesses that are here could do better...new Dolce Vita service isn't great...though it was better at old location. That loses me...service has to be good with food and food has to be good for prices at all restaurants. I feel we need more family friendly quick eating that is better than fast food. Qdoba, Chipotle, salad places, sandwich places. I also think more clothing and gift stores with accessible items that aren't so specific or expensive. If I need a shirt and do not want to go to Target or Kohls or Macy's across town I need a place I want a place here I can go. Toy stores and antiques and art galleries are all already great.

41) I am curious why such a fluent area is lacking in high quality, but not exclusive, dining and shopping. We moved here in the mid-90s because it reminded us of Palo Alto/Mountain View/

Sunnyvale California in the mid 1970-80s. It seems to be fading a bit, be we still love it.

42) Don't let DT become a parking lot. We need more businesses not more surface lots.

43) I try to shop Zionsville first for most things I can buy here.

44) Need more diversity in food for down town!

45) I try to shop in Zionsville as often as possible. I don't expect stores in downtown Zionsville to be able to compete with big box stores on everyday items, but I think they could offer more in the way of moderately priced clothing, gifts and accessories. The prices are usually just too high for me, and the clothing is either too young or too "boutique-y". Also, it would be very helpful to shop in the evenings or on Sunday.

46) I do not like it when a business parks its large vans or trucks in front of the business. It blocks the view of the shops and galleries and it seems that they are more important than the customer.

47) You want to visit downtown Zionsville, but you don't need to.

48) charming, quaint, well-kept, inviting

49) I would like more area (quality) restaurants, not necessarily downtown but in new corridor?

50) We typically walk, but sometimes drive depending on the weather. We've never had parking issues. The charm and walkability influenced our decision to move here.

51) When my husband and I want to go out we like dinner and music. The options in the village are average to poor. We moved here from Downtown Indy, so we were disappointed how behind the times the village seems to be. The village needs some Mass Ave flair...exciting, new, and hip. Antique shops and galleries are great, but they seem very geared toward the older community. Also, how many more real estate offices and banks do you need in the village? A butcher and bakery would also be fantastic! There are plenty of young families in the neighborhoods. The village needs a face lift!

52) Would like competition for Marsh. They are going downhill quickly -- more Food Club, fewer brand options, removing brands I depend on. I am NOT a shopper. I never just browse, so I am probably not your "average" responder. I need something, I go get it. Don't mind driving a few miles to get something (e.g. office supplies) and the stores I wish were closer wouldn't come to Z'ville because it is too small. Zionsville has to decide sometime in the near future "who" it wants to be -- small and charming or compete with Carmel. It has an identity crisis for which needs a great deal of "counseling" and until that crisis is resolved, not much will change. OR, does it have to. If one looks at other towns the same size, I think Z'ville has more to offer than most. I think the average resident is quite happy. Perhaps the merchants are expecting more than the residents can provide. Maybe it would help for the ZMA to have several members who have no connection to the merchants to be on their advisory committee.

53) I like the shops, but wish they had more weekend and evening hours. I appreciate that it is not "chain" stores. Would like to see more businesses, without losing downtown residents. Toy museum could become multiple retail and studio spaces?

54) nice downtown but needs more of a "draw" for shopping/entertainment

55) its ok to keep downtown quaint as long as we bring in the tax dollars elsewhere- I am not opposed to Walmart - it's no worse than target or Meijer. Fed express truck warehouse is worse alternative in terms of added traffic and no other benefit to residents

56) I love Zionsville and that is saying a lot since I moved here after being in Chicago for 23 yrs. Zionsville is wonderful!

57) Business on Main St. is well taken care of but the business on the truck route, which is high traffic, are unsightly and poorly taken care of (i.e., The Dirty nasty Dairy Queen).

58) Is there a private (pay) lot in the Zionsville study area? I don't think so, odd survey question.

59) Better hours convenient to working adults

60) There needs to be more variety in stores. It seems everything is an eclectic store, a salon, or a professional building. There are not enough places to warrant wandering around and checking out regularly. (Contrast to Brown County.)

61) We have fine dining, and casual dining (Ciao and Friendly) the "new" eagle creek is still making a name for itself. Something like the old McKameys would be welcome.

62) Zionsville

63) ZIONSVILLE

64) limit mail street parking to one side of the road-road is too narrow for two way traffic with parking on both sides of the street

65) Not a well-constructed survey, I doubt this will provide the guidance you seem to be seeking

66) Lived north of town all my life and raised our family here & attended the Zionsville schools. Love the town of Zionsville but do not shop there very often.

67) Parking on Main Street should be changed. It is crazy navigating that street with cars parked on both sides. Parking should be on one side only or eliminated completely

68) I am disabled and we have virtually no disabled parking available.

69) There are too many insurance, real estate, and nail salons in town. It used to be such a wonderful little village.

70) We try to shop or dine locally as much as possible and still will. However, the variety is getting a bit stale. Individual shops and restaurants are trying to keep it fresh but we are looking for something interesting. A pizza place that shows silent movies like Noble Roman's used to that is packed with kids and families after a hard fought soccer or baseball game, perhaps? Also, has some sort of shuttle service been discussed? I think we would use one at least twice a week if one ran along Oak from Anson Marketplace to downtown with a few stops in between.

71) I love Zionsville. Pretty, simple and has character. Needs greater variety of retail and restaurants.

72) Lose the Christmas tree in the middle of Main St. Safety issue, plus it looks out of place. I realize its tradition, but people ask me all the time why Zville does this and they laugh at it.

73) Please resist chain stores! Fast food places will NOT add to the feel of the town. We are getting more like other towns all the time.

74) More bars/restaurants. I am concerned this survey is not getting into the right hands. People like my wife should take.

75) Stores need to stay open later in the evening, to allow people to shop before or after dining in downtown Zionsville

76) Many empty storefronts, inconsistence in food quality and service, please clean The Friendly, go Wine Guy!

77) Visit other communities similar to Zville-- Hudson, OH or Sewickley, PA

78) better newspaper with more focus on downtown, better curb appeal, no parking just walking, earlier morning hours, more updated antique stores hours, coffee shop,

79) Shopping too high end. A little moderation in the mix would be nice for those of us who aren't wealthy.

80) Portillo's would be a great addition to Zionsville

81) There isn't a good variety of shops downtown nor are there many shops that sell anything I want or need. There needs to be new life downtown, it is very touristy. Can't the public parking lot be turned into a two level parking garage? The garage could be well disguised. I have lived here since 1985 and find the downtown essential to the identity of the town but unfortunately find the businesses to be stale. We wanted to put a business downtown but the rent was overpriced and chose another location in Boone village. Apartments above the businesses would be wonderful. Do we really want realtors & office space taking key retail space?

82) it would be great to get some more shops/businesses/restaurants offering great dears since that is why I typically don't shop near main street unless its coffee

83) Since we live on the edge of downtown Zionsville, we almost always walk into downtown (except in winter, when we'll often drive). However, if we didn't live in the immediate downtown vicinity, we would definitely find the flow of traffic on Sycamore, Main/Zionsville Rd and 1st street and the lack of parking on evenings and weekends much more aggravating than we do.

84) Priceless!!!

85) It has potential to be more welcoming and cozy.

86) Town needs to decide what type of community it wants to be in 30 years when development has moved on. Less rails to trails and better long-term infrastructure. You can be downtown Indy faster than easy west in Zionsville. Constant strategic plans do little good if never acted upon.

87) Stop letting businesses take over vacant storefronts that aren't stores to shop in (i.e., realtors).

88) please do not start charging for parking

89) We would love live music environment for the under 30-50 aged crowd

90) The uniqueness of the Village should be appreciated. Citizens should shop Zionsville first!!

91) We really need a good fast food or casual dining restaurant downtown, as well as more variety in goods (not all specialty goods, as it is now).

92) Love the Village...hope for more quality retail...clothing, gifts, home accessories

93) Somehow make it more of a destination - but then, our retailers would have to expect that. Longer hours.

94) Wife and I love to ride bikes downtown. Anything that makes biking a better experience is greatly appreciated.

95) The new landscaping downtown has just made the streets more narrow than they already where.

96) Less antique stores!! Great for tourists but what does it provide the locals? A yarn store? A clock shop? Come on. No wonder places don't last!!

97) Please don't take the advice of a bunch of new residents wanting Zionsville to become a Carmel or a Fishers. Downtown Zionsville is great...please leave it as is...do not be concerned with the tax base of the town...the town is fine and will be fine if you control town growth. No more homes, no more apartments...work to keep the town SMALL. Please don't think that there's something that needs fixing. The town is thriving.

98) The Village could use a "face lift" and the merchants could be more customer friendly

99) A store with ONLY local food and produce open all year round with a few tables for a cup of coffee or tea

100) Generally very good. Would be good to see a high quality coffee place with quick service and good hours (similar to Starbucks offering). Also the Payless liquor store is very unattractive and does not look maintained. Could also benefit from more mainstream shops like a butcher, bakery (that bakes and sells bread) and grocer.

101) The downtown looks trashy with all the signs. It's hard to walk around the town with all the things on the public sidewalks

102) Zionsville needs diversity in the shops and with the prices affordable not extravagant

103) Need to be more like Carmel and their Arts district with go to places like Joe the Butchers, Mudbugs, Olive oil store etc. instead of musty old stores with cheap merchants and only food options are for lunch ladies.

104) We would love to have more restaurants in Zionsville including great breakfast places & lunch places. Business people need a reason to eat in downtown Zville - need a good breakfast/lunch place. And many more restaurants!!!

105) The town is nice, but seems very slow and sleepy. Shops need more modern products and look.

There is a real need for some energetic, fun nightlife on weekends - like sports bars with live bands and dancing. And it is really pathetic that I cannot shop on Sundays there, as that's my main shopping day since I work all week. So I go elsewhere.

106) Shops need to price their items fairly, not inflated because they're in Zionsville...that's why I don't shop here except Wine Guy and restaurants.

107) More diversity in stores and business is needed. home good stores, women's/men’s apparel

108) Love the brick street, the slow pace, the friendliness, wish things were open on Sunday and restaurants and bars open until 11:00 on weekends.

109) The hours are typically archaic (i.e., closed Sunday Monday etc. I love the recent additions and look forward to South Main projects. I do not want to see Zionsville lose its charm, however, and commercialize to a downtown Carmel level as the short-term trends would negatively impact the big picture.

110) Some of the stores I listed as not making a difference to coming downtown are because we already have stores in that category i.e. a wine store. I really do miss the Ironwood Bookstore and B. Wrights

111) More handicapped parking would be great!!

112) I love living in the Village, but I feel we need more retail shops with extended hours.

113) If you want people to visit must keep a healthy mix of shops. We have too many beauty shops!!!!

114) More variety would add to this town a lot! It's all too gourmet right now...! Bring ethic restaurants, organic food markets, sushi to town

115) More bike access, need to engage mid-20 & 30's community (a pub other than 65+ Friendly would help), increase variety of stuff (not just jewelry/clothing/restaurant), 56th & Illinois is a great model to bring in consumer traffic,

116) We would love to spend the day downtown shopping and dining just not enough places to go so we usually go elsewhere.

117) Be careful of what kind of stores you put in. This is an independent store area, higher end. No junk.

118) I dislike that, aside from restaurants, it closes up shop after dark and Sundays. Love to have a bar with lively entertainment

119) I do hate to see us losing so many of the shops. I hate to see bldgs. empty (toy museum). We need to provide special shopping opportunities and market it.

120) better looking buildings /new construction / not only painting front of buildings but actually renovating them

121) When we first moved to Zville ...I loved to shop downtown. Now I only go to Kristen's and Greeks pizza.

122) People are impolite and careless drivers, I work downtown and see a lot of awful driving

123) Traffic flow along old 334 is horrible. Pedestrian or bicycle to get to "Downtown" Zionsville is difficult from outlying areas.

124) Add a variety of stores, more geared female merchandise, more fairly priced for families, ice cream, specialty stores like found in Charleston, etc.

125) While I personally am unable to bike to town, I believe that a bicycle friendly city appeals to younger families, and I've not seen any effort in the Downtown Z'ville area to become Bike-Friendly.

126) Stores need to be open on Sunday afternoons. Stores need to keep hours consistent with other businesses. I

127) Need more spaces to park bikes/lock bikes. We don't need LOCKERS, just bike racks. Need to encourage locals to walk and/or ride more - not use our "guest" parking.

128) Need to be more bike friendly (i.e. bike racks, etc.)

129) Keep chains out of village. Could use a reasonably priced casual family dining with kids and junior menus.

130) I have lived here since 1978 and attended school from K-12 in Zionsville. I miss having a more diverse downtown. I miss the local grocery store and pharmacy. I love being a parent here and having great schools and a great community in which to raise my children.

131) More places to park bikes, more family friendly average restaurants, and tween/teen gaming store

132) I get a lot of comments from out of town guests that I take downtown that while it is cute, it isn't very shopable. There needs to be a great variety of stores that offer clothing, jewelry, household items and gifts in the price range of $10 - $50. They always end up purchasing things in the same 2 places - 1. Chocolate shop and 2. The toy store. Restaurants are great!

133) I really feel we need more family-friendly restaurants in downtown Zionsville, Boone Village and Anson. I would also like to see more upscale restaurants such as places that compare to Oakley's, Meridian Grill, Northside Social, etc. Bubs will be good for the kids, but we need more than that...maybe a grill that offers sports being played too. Shopping is a big concern of mine in downtown Zionsville. I mostly have to leave to find clothes for myself, shoes, and home accessories that aren't antique looking. Delany's will be a nice addition, but that is more gifty, not so many home accessories. I used to run a home accessory and gift store out of my house and it was quite successful. Indy has lost most of those stores to the economy. It would be nice to have one close by. I live in Stonegate, and we don't have anything good in Anson. I'm worried that Meier will bring other fast food chains and restaurants that aren't up to snuff. We'd love to have a PF Chang's, Maggiano's, or something comparable.

134) We rarely go down town b/c we have young children and there just isn't much for them to do, see, or eat there.

135) Keep the charm of downtown!

136) Needs more diversity and change in products offered instead of the same ones and stores should be updated

137) We need pedestrian walk signs to push when trying to cross brick street. With all the cars parked it's hard to see the people crossing between parked cars.

138) Shops should be open at least limited hours on Sunday if they want the business!

139) Would really like to see a tenant in the old Carter building. Fabulous location would be an excellent place for a family friendly restaurant (like Spaghetti Factory) that is open at nights, including Sunday's. Let's not be afraid of national businesses, I think all types of owner/operators should be welcomed and embraced; it just depends on the type of business. Please look at more family-friendly businesses. rather than boutique art, antique, etc., as I would not take a child into any of those places.

140) We like to stop weekend nights after 9 for dessert and a drink. Too often restaurant staffs are irritated when we show up after 9. Guess they're ready to close up. Now we go to Stonecreek. They love having are and us very welcoming. Something to think about. Some merchants are standoffish and egotistical. Guess they don't want our business. I'll go elsewhere to spend my cash.

141) Need a broader base of shops

142) Love the charm, hate the lack of variety

143) We need to disallow office/service uses on 1st floors on Main Street, Town also needs to purchase private parking lots and make them all public with clear denotation that it is public parking. Lastly, need carefully located and shared dumpsters instead of each business having their own.

144) Downtown Zionsville needs more parking-that is a real deterrent. Also, more nice lunch places and upscale restaurants. A Trader Joes store would be ideal.

145) I think Inga's Popcorn was a nice addition to downtown, I like The Friendly but I wish kids were allowed. There seem to be too many offices moving in lately, I hope that trend changes

146) Primary desires- more variety in specialty shops. Better evening and Sunday hours

147) I love downtown Zionsville but would like more dining options. Portillo's is a really neat environment that would bring a lot to Zionsville.

148) This town is a mess and we are currently looking to relocate after 20 yrs it is simply slowly sliding down hill in all aspects!

149) Need more than art galleries, museums and a few overpriced restaurants

150) In general, Zionsville has no appeal to me. They're too outdated and behind the times. Per capita we make more than but they know how to keep their residents spending money locally. Zionsville needs new blood to catapult this Towns

151) too many vacant buildings, sidewalks not maintained, low variety of shops/restaurants, poor

shopping hours, no restaurants stay open late

152) No chain restaurants, please - Especially not fast food!! Having unique businesses is one of the things that makes Z-ville unique!

153) I feel very passionate about the improvement of our town. We are missing so many items in our village. We need more GOOD restaurants, family spots, retail stores. We have the character of an amazing town but nothing is in it. We need a Cafe Patachou, Pizzaology, Napoliese, boutiques, chipotle, Pop belly's, sports bar with a lot of character. Turn the old toy museum into a bowling alley or indoor roller rink. More family friendly ideas. The dairy queen needs a major face-lift.

154) I think Downtown Z. has great potential, I think if we could attract a couple of larger stores it could be a jump start to the downtown area.

155) It's wonderful, and the extra events are great too! Glad the winery's came too.

156) Plum's Upper Room is great, would love to see some more local recognition with the new chef doing such a great job.

157) Zionsville

158) More healthy food options with easy service options would be most exciting for us,

159) I wish the shops were open on Sunday. I would like to see some more casual dining restaurants.

160) It would be nice to have a gift shop like Tangerine

161) more casual family restaurants needed

162) downtown needs some street art and some unusual stores or discount upscale stores

163) As a business owner wishing to relocate to downtown Zionsville, many of the buildings need serious renovation in order for me to consider spending my income on the square footage. Even cleaning them before showing them would give a better impression of how important it is or isn't to rent these spaces.

164) It's not just the experience of employees and businesses; it's the people that also influence the experience when shopping in Zionsville. It's the friendliness of other patrons at the businesses that has caused me to drive through the town and go to other businesses to shop.

165) do not bring in chain stores- GAP, Talbots, Chico's, Barnes & Noble, etc.

166) more everyday boutiques vs art...open Sunday and later than 5

167) eliminate parking on main street cars can't get through

168) Too many high-end galleries. Not enough Regular Joe shops.... like Broad Ripple shops..... and restaurants

169) I love the feel of downtown Zionsville, but I also know that many shops will be overpriced. However, we enjoy going there on special occasions.

170) Business need more variety, affordability, evening, weekend, and Sunday hours

171) love the merchandise and feel of downtown but on our income we can't afford much merchandise or dining with kids

172) I would like to see a really nice gift shop and classic, upscale ladies apparel stores. We are too heavy in art galleries.

173) Find Indiana businesses to come. Bazbeaux, stouts, etc. they would fit well with culture

174) I love downtown, but would like more shopping options that are reasonably priced and meet the needs of my family

175) Keep supporting schools. Art and other things for kids bring us downtown. Something for kids to do when they come as guests to our house. Parents want t

176) Need more places open in the evening on weekends. Old toy museum space needs to be addressed.

177) I just don't think we are keeping up. The charm of brick street isn't there anymore. Makes me sad. We need something special to bring people here.

178) Need to re-route 334

179) More stores to increase tax collections

180) We need more stores like a super target at Anson and a place like terrace clay here in Anson

181) We love when there are things going on here, but we don't usually know that there are things going on! Marketing more would help a lot! Also, the shops/restaurants seem to cater to the more affluent, while there are many of us who are solidly middle class. Can't there be a middle ground?

182) I would like to see downtown have a nice fully stocked bakery where you can go in the morning and get fresh doughnuts or loaves of bread, etc. It's such a great downtown but it's time to make it much more inviting for people to come and shop and dine. Feels like it is sometimes stuck in a time warp.

183) It is a great place. I like it for the entertainment - glad that there is more music. Now it would be nice if the restaurants stayed open past 10pm - so you would have a place to go after a play etc... for dessert.

184) We are the original "Clay Terrace" type of shopping. Let's get some decent upscale and funky shops. We aren't a quaint Victorian or Colonial village. Let's get some cool stuff in here. We need to lose our identify crisis and just be who we are. We need to serve the residents of Zionsville.

185) need more outdoor dining options to take in the atmosphere of the Village

186) Went twice, disappointed. Too many spa/salons & food. Expected more clothing boutiques. Farmers Market small crowded and expensive. Just moved from small town and just wasn't what I expected.

187) All the emphasis on parking seems to miss the larger problem; the village isn't laid out well and

offers very little shopping or food for busy FAMILY needs

188) would be nice to have down to earth people working at these businesses rather than wannabes,

189) I love the quaintness of the Village. I would not want it to become like the Carmel downtown.

190) Really like downtown Zionsville. Would like to see more reasonably priced boutiques like Lesly Jane. Maybe one that specializes in active wear. Prefer new restaurants to be non-chain. .

191) Zionsville

192) an

193) I try to patronize Zionsville businesses whenever possible and convenient. I hope others do too.

194) Please see Hudson Ohio downtown shopping.

195) please no chain stores, stay original

196) Very quaint!

197) I really would like to see a restaurant with great service! Healthy food is also important to us.

198) We do not spend a lot of time in downtown Zionsville because it is out of our price range and the things I need day to day I get somewhere else. The stores downtown seem to be for those who are not buying necessities and have extra money to spend. It would be nice if there were more things available for common folk.

199) We need something other than pizza that is family friendly :0)

200) We live close enough to walk and bike to downtown...but often times we choose to drive because there is no great way to bike around downtown or places to park your bike. Additionally if you are trying to cross streets either walking or on a bike it is extremely difficult to do, especially on the main strip in downtown Zionsville because there are no designated crosswalks and you can't see around the cars that are parked on both sides of the street.

201) Please do not take away the small town feel or add any chain stores!!! That would ruin it. There is hardly any place on earth like Zionsville Downtown left.

202) More Sunday hours would help. I only have two days to do everything. Saturday is often full of kid events. When running errands on Sunday afternoon if a Zionsville option isn't open, I just go over toe Michigan Road and spend my money.

203) Please keep the character and independent business but get more variety, better hours & a grocery!!

204) Needs to be modernized with hip new stores

205) no

206) Zionsville needs more commerce. Hinsdale outside Chicago has a great home good store that is a smaller scale of a Crate and Barrel. Somewhere to buy home accessories, wedding gift, etc. Athletic apparel higher end. A great Breakfast place. That serves a full menu!!

207) WE'RE THRILL ABOUT THIS SURVEY. ZIONSVILLLE NEEDS A BIG BOOST; IT NEEDS THE ELEMENT OF WOW, WOW!!

208) I would like to see a roundabout at Main & Sycamore and a roundabout at First and Oak, to vastly improve traffic flow.

209) For a great example to model our downtown and look different than Carmel research Pleasanton, CA restaurants, art, stores, fresh produce.

210) Please make parking more convenient. I can walk where I need to go, but other potential shoppers find inconvenient parking a liability to coming here.

211) OPEN ON SUNDAY!!!! It's crazy that a destination city like Zville is closed on Sunday - Downtown Carmel it stealing all your business!!

212) I love the town of Zionsville and love the village atmosphere. But I don't think everything has to be innovative and different. To combine both the unique and very traditional i.e., restaurants and shops would make a big difference in your goal to make it more appealing.

213) When I moved here 25 years ago, we had the nicest stores on Main Street: Grocery, Toy Store, Paper Store, Hardware Store, Soda Fountain, Bakery, Children's Clothier, Bookstore, hardware store, Giftable Stores (Tin Soldier, General Store etc.) and Zionsville had tour buses bringing people to shop and eat. Zionsville has exploded with people living here since and all these wonderful stores are gone. To purchase a nice gift you have to go to Carmel. When we had the stores we were a much smaller community, now that we have the people with dollars to spend, we have lost all of our nice stores forcing us to go elsewhere. I hear people every week complain about all of the insurance, real estate, and businesses that have taken over our Main Street.

214) Na

215) Don't bring in chain stores/restaurants. Zionsville has a unique factor about it that would be sad to lose.

216) We need more variety of merchants "on Main Street" that sell crafts, nick-nacks, Zionsville items, gift items -- like the Old Country Store. We DO NOT need any more art gallery or "business-type" businesses. Need more unique shopping experiences like in Brown County/Nashville. Lived in Zionsville all my life and know what I'm talking about. The "business/office" type businesses will take over and are taking away from the shopping experiences.

217) It seems we tend to go with lots of same businesses, fitness and similar restaurants. I feel like we need more diverse restaurants and that upscale club like a bourbon/cigar club would be a great fit that would bring in people. I also feel that Zionsville needs a really good public golf course that is actually in Zionsville. There is a lot of money in golf, fishing, cigars, bourbon and it can all be done upscale. Art shops will not last, not enough art is purchased to sustain them all

218) Downtown needs an identity. There are lots of small towns that are in the same predicament as far as attracting people. Pedestrian and Bike accessibility via pathways should be a premium. Commercial businesses should not be on Main Street but should try to be on side streets or otherwise. Main Street should be highlighted more with mini-festivals (think craft beer, or

something else unique like Garlic Festival, etc. Connectivity to Eagle Creek should be looked at as well via Kayaking etc.

219) Need more clothing shops or something that will get me downtown Z and open on Sundays.

220) I think the parking is just fine. The biggest improvement that could be made is Sunday and evening hours consistent for all businesses.

221) stay high end/arty/ no flea market or crafty stuff

222) I don't like odd store hours like closed on Monday's! I like consistency! I went downtown to visit a specific new store and here they are closed....no fun!

223) Zionsville

224) With the exception of the Toy Museum, which is off scale, the downtown is very attractive. I drive through Main Street every day and there are always people shopping. I think there are a lot of businesses that would do well. I know Trader Joe's does not put in new stores frequently, but I know that would be a hit.

225) we aren't Carmel and shouldn't try to compete with them - chains and large stores not locally-owned are going to turn away the downtown customers who are currently loyal (it's always cheaper to retain a customer)

226) Be open on Sunday and Monday

227) Love it! Just wish there were restaurants that were more kid friendly, but not fast food and not another pizza place

228) Need a microbrewery! Have heard Andy Simonson may be the guy to contact...

229) Too expensive, not open when I shop, not the things I need

230) small town feel is why we moved to Zionsville

231) Love it!

232) Stores that are open in the evenings and better parking would cause me to shop in Zionsville more.

233) Would like more bike routes from outside subdivisions into the town to promote healthy travel and reduce traffic. Most county roads do not have bike lanes and this would be VERY helpful given the # of bike groups and riders on the road. We are casual riders with a bike cart for the kid but lanes would serve many purposes.

234) I love to support local business but it seems most of the shops are clothing or sit-down dining. Neither of which I use much at this stage of life.

235) Shop owners and employees take up much of the on street parking. Many times I give up shopping on Main St because of the lack of parking. Business owners whine to their customers about the lack of Zionsville residents in their shops. Business owners need to decide if they want to cater to the locals or be a tourist destination. How much fine jewelry and original art can a

community buy?

236) Make it attractive to merchants...better taxes, fees, promotion. Existing merchants who want to expand find it difficult to navigate the requirements and fees.

237) I would love to shop in the village but I am unable to afford the stores there...would love to see some more stores with some lower price points.

238) Signs to show the side street business. There is more to downtown Zionsville than just Main St.

239) Too many restaurants that have bad or overpriced food. Patrick's is overpriced for what you get, and all of the Pizza places make terrible pizza. What is left is not good for family dining with young kids.

240) More specialty clothing stores would be nice that carry more well-known brands.

241) Would like more dining options especially with carry out (prefer mom & pops to chains in town)

242) The main reason I don't patronize the shops and restaurants more is because everything is too expensive. Would rather drive a couple of miles down Michigan Rd to less expensive shops and dining options.

243) I strongly think we need for shopping opportunities in the Village and more family dining. I think we need less hair salons and service oriented businesses especially on Main St.

244) More bike racks downtown. A pedestrian and bike crossing across First Street.

245) Need better hours and more variety.

246) We do not need any more at galleries, jewelry stores or Antique shops

247) We would love more family friendly restaurants so we can take our family on long walks, enjoy the park and then eat out.

248) Need to make first street only parking on west side so that trucks can deliver without blocking road

249) In general, more casual and family friendly restaurants are needed. Also, things need to be open on Sundays when everyone is home. A bagel store, such as Einstein's, would be a great addition. Also, a microbrewery, such as Upland or Matt the Millers would be a hit.

250) Would be great to have more restaurants

251) there are not any "shops" on main st that are useful to me

252) With teenage children we wish there was a "draw" for them. We go to Clay Terrace or Castleton for them.

253) More family easy food options, later night brew pub, breakfast bagel shop, easy sandwich, soup, no more hair salons, real estate offices

254) Craft store needed

255) I love downtown Zionsville but I can't shop there for everyday items or even weekly items.

Hours of businesses are very poor. Nothing consistent & all "bankers hours"

256) More family friendly restaurants

257) Need a card and gift shop. Restaurants are very expensive so we don't done there often.

258) please expand offering of businesses; Zville needs to be more business friendly

259) I love Zionsville. I'm just not much of a shopper, no matter where I live, and we eat at home.

260) Whatever is added to downtown Z'ville, please keep the Village's unique charm

261) Wish it could be more like Carmel with lots of restaurant choices.

262) Don't sacrifice the look of the village for convenience, but consider trying to stay with the growth a little more

263) Need more family restaurants and a health food store like trader joes

264) Wish it were more friendly and welcoming; too inclusive and not very diverse

265) We would love to see more family friendly dining options. Also, quick service, less expensive takeout and an ice cream shop would be lovely!

266) Get some specialty shops in the Carter Building and bring back the ice cream shop. Slow down the traffic before a major accident occurs.

267) I often feel the storekeepers are very unhelpful and unwilling to go even a little out of their way. The restaurants are the opposite, typically they are wonderful!!!

268) Stop with the art galleries and antique stores. There are too many. There are also too many offices that take away spaces for commercial business. Zionsville needs to get with the times. People are driving ten minutes to Carmel and Carmel is getting the revenue we should be getting.

269) As it is, Main St. is for tourists more than residents.

270) Needs a 'gateway' to emphasize the sense of place of the village. Also the village is all but dead on weekday nights as far as shopping is concerned.

271) I would look into more home goods type of store to add downtown. Trendy, contemporary goods, not just antiques

272) Merchants should park away from their business so customers have easy access

273) With Zionsville purchasing the PNC bank and parking lot that should help with some of the parking issues. The bank building would be a wonderful chamber office very visible. Public restrooms in the downtown should be available for visitors I understand maintaining them and keep vandalism from destroying them would be difficult. I do not think there is anywhere in town or outlying areas that have a public restroom. Yes in Mulberry Park. Couldn't our fine officers drive by occasionally to check them and they could have posted hours. Some big businesses would be hard pressed to fine building(s) large enough in downtown other than Carters building there is space at the old Marathon location but not another strip mall that is not downtown Zionsville look.

274) Need to focus on retail and restaurants which are hurt by professional business

275) no

276) Great location - love the small town feel, but old doesn't 't mean it can't have a fresh vibrant face

277) Property taxes are too high for what you get in return

278) Zionsville is so quaint and charming. I love the trail access, walkability, and general cleanliness.

279) Shops should be open on Sundays (At least in the Spring, Summer & Fall)

280) Put a roundabout at the intersection of Zionsville road and sycamore to better control traffic downtown.

281) It would be great if it were like Carmel. We need good chain stores and restaurants.

282) Bring in some good stores, possibly name brand chains. Maybe a Starbucks. Downtown Zionsville has nothing and I never go there to shop or dine.

283) Down town Zionsville lacks energy. The restaurants are average, and the vibe is boring. The Town needs to decide what it wants to be. If it is to be a draw...it needs better dining, more dynamic shop owner like ballerinas and bruisers, and a night life that doesn't end at 10:00. Though some of the establishments provide music, it is mostly old school boring. I must also say, the down town area is neglected. The walks are a patchwork to fill in concrete. The street trees keep being cut down and not replaced. The streets are dirty and the green infrastructure is portly maintained and disgusting. Quality of the environment goes a long way to dictating the experience.

284) Need bike parking and a microbrew that serves good affordable foods & healthy options.

285) great parks and outdoor family facilities available but few indoor family entertainment choices

286) I don't like the feeling of a monopoly that one family owns the majority of the buildings and charges rent that frequently causes businesses to turn over. Need more casual sit down dining that is affordable and not pizza. We like the friendly but never go because you can't get in without a long wait and no place to wait.

287) We need a REAL bakery

288) We need places to shop and eat that are not all so upscale that we can't afford anything. I almost always leave Zionsville to go shop and eat

289) I really dislike the street parking. The cars, plus the slightly winding road, make it difficult to safely cross the streets, especially if you are crossing with children.

290) Love it, it is why we chose to live her-small town feel, a little like New England

291) No more antique shops or knick knack stores. Whole Foods. Men’s shop. More stores like Leslie Jane to make the village a destination point. Put something in Carter's building. Town homes.

292) Love to have an ice rink and indoor tennis in Zionsville

293) We came from Silicon Valley in June 2012, we love Zionsville!

294) Rent too expensive!!!

295) Extremely cute, but downtown Naperville provides a good example of how to combine small and chain business but maintain a small town feel.

296) Please bring an all-natural grocer to Pittman Farms like Whole Foods or Sprouts

297) Need more family friendly restaurants. Zionsville duplicates too many stores/restaurants- CVS, McDonalds, too many banks, etc.

298) Merchants need to be open Sat & Sun. They don't provide the goods & services that local residents need on a regular basis that can sustain their business.

299) I feel that there are too many art galleries (how many people buy art on a monthly basis? We need things that people want to buy. I think Z'ville. Was really hurt by the demise of the potpourri dress shop and moving of Calico corner. Both were a destination ...that often included a meal. Miss the gift horse. ..A place you could pop in for a gift. We need to meet the needs of the average visitor.

300) More family style/casual dining would be appreciated, along with food places such as Chipotle or Which Wich or Qdoba.

301) We love our town. Please do not bring big stores and damage or destroy our town's small business. We love Zionsville and please do not bring motels and storages in this town.

302) few eating options on Sunday evening and limited shopping on Sunday

303) Additional bike racks would be helpful.

304) no

305) Too many expensive specialty shops and not enough of the stuff you need for daily life....not everyone is in the market for antiques and expensive clothing and jewelry!

306) We ideally need more shopping attractions, not a realtor office, on Main Street. Places need to be open all weekend, both for families and outings without children. I would spend a lot of time watching all sporting events if we had a bar

307) I am an employee of a Zionsville business and commute to/from the Oaklandon/Geist area

308) Increase open late cafe shop.

309) Love it!

310) More store coupons should be offered in our local newspapers -- for goods, not just services.

311) The only place we visit is the Friendly Tavern

312) Valparaiso, IN did a very nice job updating their downtown by opening up trendy shops/restaurants. It's busier now than when we grew up there:).

313) Love the town of Zionsville - do want to be picky about what we bring in - don't want to lose the

safe, family friendly atmosphere.

314) It’s not the quantity of shops or restaurants, but the quality. If the quality is not there consistently, we drive somewhere else.

315) There is no place to shop for everyday items. Too many art galleries. No place to shop for gifts anymore and things are way too expensive!!!

316) I do love downtown Zionsville. I want the same old downtown feel (cobble streets) but more reasons to come downtown.

317) Need to improve the appeal of 1st Street. Add curbs and new sidewalks.

318) More bars/restaurants. I am concerned this survey is not getting into the right hands. People like my wife should take.

319) 1) Stop w. the one way streets 2) main street should be plowed from curb to curb in winter to allow for better travel 3) move the Xmas tree out of the intersection it's in and down to the next intersection that is not curved and wider.

320) stop taking out parking spaces for "green space"

321) Get a pathway like the Monon in the Arts District in Carmel

322) Why did you stop Walmart from coming in?

323) What is the economic output of an art gallery/studio, as compared to a retailer?

324) Buying a home in Zionsville was a great choice for me and my fiancé. We love the farmers markets and downtown activities. We are looking forward to the Meijer being built and hearing more about the Pittman Farms project.

325) 334 is difficult and congested as it goes through downtown Zionsville. Large delivery trucks blocking the road or making it single lane has caused me to avoid the downtown Zionsville area, unfortunately. Thus, I do not have regular access to it or activities going on there...

326) Need better dining choices in better buildings - more updated / remodeled. Better prices

327) Modernize; don't be afraid to go outside of the box you are in...growth isn't such a bad idea

328) Store prices are not competitive. Too expensive for today's economy.

329) We love it, but please, no more development! Keep Zionsville small!

330) We want it to flourish, grow and improve while keeping our charm!

331) It's hard to stress how important cross walks and/or stop signs are for Main Street. It creates ambiance and most importantly safety... I've watch many adults and children play dodge ball with SUV's... it is NOT safe

332) Love the character, would like to see more variety, longer hours, more restaurants and relaxed dining

333) I miss Eagle Creek Coffee Shop

334) I work in a retail store and talk to the customers and a lot are from out of town or meeting people there for the day. You need a place to eat but you need retail stores for them to wander around town. The old toy museum would be a great place to have multiple retail stores. Business's need to be open more. Closing on Sunday and Monday affects all retail stores as people then do not come on those days or will not come back. Appreciate that the town is looking for improvements. Getting a lot of restaurants but need a place for them to shop. Restaurants bring people in the evening but the retail stores are closed since they are owned by a single business owner and cannot compete with box store hours.

335) I still do not understand why the corners of Main and Cedar and Main and Oak are not 4-way stops? Plus I think parking should be illegal at the corners of these streets so you can more easily see traffic. I know this would reduce the amount of parking but it would make driving so much easier. Also, we parked in the large parking lot of a furniture store this past Sat for the Farmers Market and got a "This is A Private Lot" note stuck in my door. Businesses should want to let people park in their lot? Plus, how legal is it for residents to block parking in front of their homes?

336) Have the town clean up the flower messes that they put in. In force ordinances

337) We need more retail stores on Main St. Less Real Estate, Attorneys, Insurance agencies taking up prime retail space

338) No more Arty, Coffee shops! We need eggs, potatoes and bacon restaurants and better food in general.

339) No more Jewelers, Arts, Crafts, etc. Focus on Food and convenience.

340) Encourage retailers to be open on Sundays and Friday evenings

341) Parking is horrible. Too many street closures. Restaurants are inferior. There seems to be no camaraderie between stores / businesses.

342) If you have to add parking lots, please do it underground. More parking lots make the village look like every other suburban town

343) I like the look and feel of the village area but I would like to see more development outside the village to ease the burden of taxes and inadequate school funding.

344) I love our small community but wish that there were one or two more casual family-friendly dining options

345) We don't go to downtown Zionsville for anything other than to eat out once a week because there is never any where to park.

346) Please do not fret too much about the parking before you get more stores, restaurants, etc. and have more hours. It seems like overweight folks are much too concerned about parking, When I lived near New Hop, PA I had to walk MANY blocks to get to the town after avidly seeking parking

347) I understand the merchants would probably be against this - but I would like to see parking on

Main Street be only on one side of the street.

348) let businesses come instead of blocking

349) Traffic flow stinks and the back of store fronts and First Street is an eyesore. We would like to be able to bike to the Village from West side of Zionsville. Bike paths from the west would do the most to encourage us to visit more frequently.

350) More actual chains, Bloomington town square has Chico’s, other high end chain stores to bring people in.

351) In general the food is not GREAT and everything closes too early. If I do not cook I want the food to be great. I have not found a bartender that I feel I can connect with; I am a woman and eat alone in Indy where I am comfortable with staff. By the way, The Friendly is very unfriendly. I give every place 3 attempts, but will not waste money if my expectations are not met.

352) We LOVE downtown just with there were more gift type shops

353) I work in Downtown Zionsville on a side street. Need better signage to bring customers to my workplace.

354) We love living close to downtown, but it would be nice to have different types of restaurants and shops close by so we didn't have to drive elsewhere. I would love to see a sports bar where we can watch the games on Sunday!

355) Currently our household shopping is more utilitarian than luxury, so there's not a lot on Main St. for us. We frequent the coffee shops, dry cleaner, yarn shop, MyArt, and the toy store. I do try to shop Zionsville as much as possible, and always check at our stores before going elsewhere. This survey does not include questions about public bathrooms. The lack is outrageous. I would never go to a mall without bathrooms. For years, when my children were little, I was only able to come to Main Street because our home is minutes away and we could run there in a pinch. We wish there were more family-style and ethnic restaurants; we frequently have to go elsewhere to eat or take out, and would much prefer to just walk to Main St.

356) Thanks for doing this survey.

357) hard to be a shopping destination with little variety; hard to be a tourist destination if closed on Sunday

358) Sidewalks are chunky on Main Street and should be redone. Building like Ciao and building behind Noah Grants on Main Street are a visual disgrace to town and owners should invest in or sell

359) Great place! Needs a bit more polish! Not too much, just clean and attractive!

360) I'm a 40-year Zville resident, and downtown has never looked so awful. Reappoint a committee to oversee the "look" of Main Street and bring back the "Colonial" / historic vibe. Stop trying to be something we're not (Carmel). A bright purple awning and tropical paint colors have no place on Main Street! Clean and maintain our "new" planting beds, replace the decorative stone with mulch, and trim the town's trees. Enforce the town's ordinances on sidewalk signs, handmade

poster signs, and garbage cans left in plain view.

361) The traffic flow is horrible in some spots on Main Street. For example with cars parked on both sides of the street where the road curves. I always have a hard time driving through there. Maybe limit the parking in those areas to help traffic flow. Also the house farther down the street that has the "Slow Down" sign in their yard is visually disturbing from the charm of the street.

362) My big butt would love to see Handles ice cream and a Longs doughnuts, my skinny self would like to see an indoor farmers market for winter or more of local market. A consignment shop for children would be great! What is going to happen to the old toy museum?

363) The only comment I have, please suggest the stamp & coin place in Town needs to wash their windows and spruce up their windows.

364) Thanks for conducting this survey. In short, Downtown Zionsville is a key part of our community; however, it needs a serious strategy to add new elements to the Village's DNA.

365) Great potential - just needs a little more of everything (selection, growth strategy, identity, etc.)

366) I live just West of Ford Road, and I wish we could bike downtown because it isn't far, but we can't because it isn't safe on Oak Street.

367) Add more family-friendly, casual restaurants; but NO fast food!!

368) Get rid of the cars and make the brick street pedestrian only!

369) It's sad on how the "Council" makes the decision to allow what "type" of business into Downtown Zionsville yet all of Zionsville. They just missed out on some what they call "Big Box" Companies that have gone into the Whitestown area Amazon and Meijer! Too bad they would have been excellent "tax breaks" for all of the Zionsville residents! No wonder there are so many "empty" storefronts in Downtown Zionsville!

370) We love Zionsville and would love to see the Downtown expand (in the right way) with more shopping and dining options.

371) I would like to see Main Street remain in its current footprint. I find parking sufficient. New stores to the downtown should be independently owned. It would be great if store were open on Sunday.

372) When you are trying to cross the main street in a car, it is difficult to see up and down Main Street because of the street parking so close to the corners.

373) Bike parking would be nice!

374) The speeding vehicles on Main Street are out of control. Commercial sidewalks are poorly shoveled when it snows. The dirt beds where there are trees or were trees are a tripping hazard.

375) I've lived here 30 years and enjoy the picturesque downtown area. However I have long been out of the habit of shopping or dining there because of the parking problem (much improved in recent years) and because of the inconvenient hours that so many of the businesses downtown kept/keep. I primarily take visitors there to wander around and maybe get a meal if we can find

seating. In my opinion, what downtown Zionsville needs is a performance space or some other non-shopping/non-dining destination that would then drive traffic to the stores and restaurants there.

376) Indianapolis

377) I would look up the town of Chagrin Falls, Ohio. They are a community very similar to us, but they are doing their downtown the right way. They have businesses that want to be there and that offer unique goods, but they also offer stores that the everyday consumer would need to visit. We waste so much of our precious space on art galleries, jewelry stores or antique shops - and things rarely sell! With better dining options and more stores that off

378) Would be nice to see more family friendly dining options and activities. Emphasis seems to be more geared toward older crowd

379) Have something to do.

380) We would love to have a place to sit and gather and linger in the evenings, perhaps over a drink or dessert.

381) Please, please, please install pedestrian cross walks and speed bumps especially crossing First St at Hawthorne by the Dairy Queen. Cars speed down Main St as well, making the brick street not pedestrian friendly.

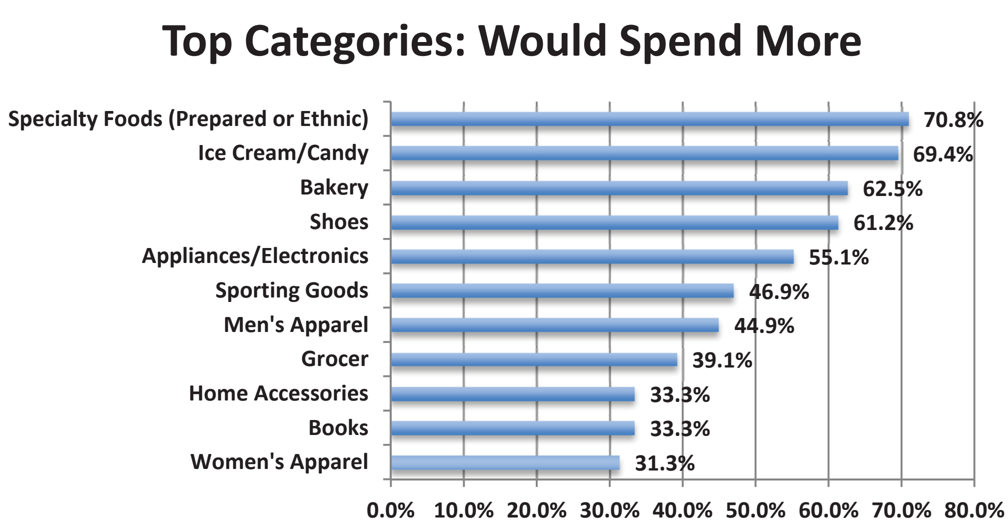
HIGH SCHOOL STUDENT SURVEY AND FOCUS GROUP RESULTS

Given that 33.7 % of Zionsville's population is under age 20, additional input from Zionsville Community High School (ZCHS) students was obtained. This input included a slightly revised version of the Consumer Survey instrument and a focus group conducted during a joint session of two ZCHS classes. These results are shown below.

The student sub-group displayed the following attributes:

- 75.5% have lived in Zionsville for 5+ years
- 61.3% visit downtown for 1 hour or less during a typical visit, usually to eat and socialize with friends
- 20.4% bike, walk or get a ride to downtown
- They want a 'second' place to go after eating—entertainment for a younger demographic
- They would like to see Zionsville's downtown be more creative, less traditional
- Their purchasing is truly brand-focused—the stores and restaurants patronized are all national chains
- Downtown Zionsville ranks fourth in where they shop and dine. They shop or dine at businesses on Michigan Road, Boone Village and Traders Point more frequently than downtown Zionsville
- Student preferred counter service and quick service restaurants, versus the casual dining format preferred by the full Consumer Survey sample.

The students' rankings for the question: How would the addition of or more of these stores affect the amount that you spend in Downtown Zionsville?



During the focus group session, the students were very excited about the Uncle Bub's opening. Several students identified certain downtown businesses where they had shopped in the past, but their preferred kinds of stores or restaurants would need to strongly resemble their preferred national format stores and restaurants.

For later insertion:

Competitive Review

Market Share Analysis

Development Assessment

Organizational Capacity

PRELIMINARY IMPLEMENTATION FRAMEWORK

Downtown Zionsville's markets, the Consumer Survey results, and this study's public process have identified current market conditions and those strengths, challenges, and opportunities facing the study area. This data serves as the basis for translating the study area's current market realities into a series of preliminary implementation strategies. With the completion of the remaining market and parking tasks for this study, these strategies will be updated and refined into strategic objectives with concrete action steps for incremental implementation by Town official and the downtown community.

The Competitive Review will suggest programs and best practices to ensure that the study area attains the vision formulated in the Town's Economic Development Strategy. The Market Share Analysis will set goals for the addition of new businesses and revenue growth for downtown's business sectors. This remaining market work will result in an overall market position statement for downtown Zionsville. Finally, parking recommendations will respond to the addition of new businesses and potential development.

1. Build upon the success of the Village's strongest business clusters and destination businesses.
    a. Develop programs to publicize key business clusters in tandem with each cluster and as part of overall market positioning, as described below.
    b. Increase visibility regionally and to residents and visitors using co-op marketing, promotions, and electronic/social media
    c. Work with study area businesses to extend business hours
    d. Work with study area businesses to improve overall quality in their operations, including their approaches to marketing their business, to define downtown's experience
    e. Assist with any business succession issues, as appropriate
    f. Reinforce market facts about downtown's customer base, recognizing that residents are indeed downtown customers and that other potential customers, including special event visitors, will return if their experience is welcoming and positive

2. Use the target businesses and categories, identified in the Consumer Survey, to develop:
    a. Relationships that foster entrepreneurship growth through new partnerships with regional small business development advocates
    b. Relationships with local business owners with multiple locations throughout the Indianapolis region to identify suitable study area locations.
    c. Relationships with brokers and site locators for major regional and national retailers and restaurants, working collaboratively to get the best tenants in the optimal Zionsville locations
    d. Formal programs to aid business expansions by downtown's existing businesses into additional or larger downtown space and in opening a new business concept
3. Ensure that the Village's property owners enable the recruitment of financially sustainable tenants.
    a. Educate downtown's property owners, brokers, and managers about study results and target businesses and categories
    b. Dissuade owners from leasing decisions that accommodate tenancies, such as 'hobby' businesses, that do not contribute to the success of the study area's business growth
    c. Refine local Incentives for space improvements (additional recommendations and examples will be provided in the final report version)
    d. Maintain property quality and character
4. Work with developers of new study area projects to identify a mix of uses that support business growth throughout the study area. This includes other uses, such as residential, suitable office locations for small users and/or co-working spaces, and compatible, auto-oriented retailers and restaurants.
5. Monitor downtown's economic progress.
    a. Work with property owners and downtown businesses to attain market capture rate goals (these recommendations will be formulated after additional data is received from the Town)
    b. Monitor festival and special event attendance with affected study area businesses
    c. Develop and use additional tools to manage and improve the study area's mix of businesses and overall business growth
    d. Update these same tools to respond to market and study area mix changes.
6. Initiate discussions on a lead management entity for downtown (recommendations will be provided in the final report version).
    a. Focus on the common vision for the study area
    b. Minimize the dilution of resources based upon individual agendas, however well-intentioned
7. Promote downtown's competitive advantages and market position aggressively to attract customers and investors.
    a. Use this study's resulting market position aggressively and in tandem with downtown's businesses to tell the study area's story
    b. Focus on the identified market opportunities to grow the study area's overall market share (applying this study's forthcoming Market Share Analysis and Business Opportunity Profiles)
    c. Use the marketing position for image making and economic development
    d. Differentiate the study area continuously throughout this process, and link these positioning and imaging efforts with economic development

APPENDIX

Detailed Parking Utilization Summary

ZIONSVILLE | Downtown Market Study + Parking Analysis

PARKING UTILIZATION COLLECTION FORM

Thursday, September 12, 2013

Block Face / Location	Type	No. Spaces	Occupied Spaces																					
			10:00 AM		11:00 AM		12:00 PM		1:00 PM		2:00 PM		3:00 PM		4:00 PM		5:00 PM		6:00 PM		7:00 PM		8:00 PM	
1 INT	private	10	8	80%	7	70%	7	70%	6	60%	6	60%	6	60%	6	60%	5	50%	3	30%	2	20%	2	20%
2 E	public	16	6	38%	6	38%	8	50%	8	50%	6	38%	10	63%	9	56%	8	50%	10	63%	10	63%	12	75%
3W	public	12	4	33%	7	58%	7	58%	8	67%	8	67%	8	67%	7	58%	9	75%	6	50%	4	33%	6	50%
4 S	public	4	1	25%	2	50%	0	0%	3	75%	2	50%	1	25%	1	25%	0	0%	0	0%	1	25%	0	0%
4 W	public	2	2	100%	1	50%	2	100%	1	50%	1	50%	1	50%	1	50%	1	50%	1	50%	1	50%	1	50%
4 INT	private	3	1	33%	1	33%	1	33%	1	33%	0	0%	0	0%	0	0%	1	33%	2	67%	2	67%	2	67%
5E	public	9	9	100%	8	89%	6	67%	8	89%	9	100%	9	100%	8	89%	6	67%	7	78%	6	67%	6	67%
5 INT A	private	14	8	57%	8	57%	12	86%	10	71%	8	57%	9	64%	9	64%	6	43%	2	14%	2	14%	2	14%
5 INT B	private	13	5	38%	3	23%	7	54%	7	54%	6	46%	8	62%	8	62%	4	31%	0	0%	1	8%	1	8%
5 S	public	1	1	100%	2	200%	1	100%	1	100%	0	0%	0	0%	0	0%	1	100%	1	100%	1	100%	1	100%
6 E	public	7	5	71%	4	57%	5	71%	6	86%	6	86%	5	71%	3	43%	5	71%	5	71%	4	57%	6	86%
6 S	public	3	3	100%	3	100%	3	100%	3	100%	2	67%	2	67%	3	100%	3	100%	3	100%	3	100%	3	100%
6 INT A	private	8	4	50%	2	25%	1	13%	3	38%	1	13%	3	38%	2	25%	2	25%	1	13%	0	0%	0	0%
6 INT B	private	22	13	59%	11	50%	11	50%	12	55%	13	59%	12	55%	11	50%	10	45%	5	23%	5	23%	2	9%
7 N	public	3	3	100%	3	100%	3	100%	4	133%	2	67%	2	67%	3	100%	1	33%	0	0%	0	0%	0	0%
7 S	public	11	10	91%	10	91%	9	82%	7	64%	7	64%	5	45%	9	82%	7	64%	6	55%	6	55%	5	45%
7 W	public	8	7	88%	6	75%	5	63%	7	88%	6	75%	5	63%	7	88%	4	50%	3	38%	4	50%	3	38%
7 INT A	private	18	12	67%	12	67%	12	67%	13	72%	15	83%	12	67%	7	39%	8	44%	5	28%	4	22%	5	28%
7 INT B	private	4	0	0%	0	0%	1	25%	1	25%	1	25%	1	25%	0	0%	0	0%	0	0%	0	0%	0	0%
8 N	public	3	1	33%	2	67%	3	100%	2	67%	2	67%	3	100%	3	100%	3	100%	3	100%	3	100%	3	100%
8 E	public	9	7	78%	6	67%	6	67%	7	78%	7	78%	7	78%	7	78%	7	78%	7	78%	7	78%	5	56%
9 N	public	5	4	80%	5	100%	5	100%	4	80%	4	80%	4	80%	4	80%	4	80%	4	80%	5	100%	2	40%
9 E	public	9	4	44%	7	78%	4	44%	7	78%	3	33%	6	67%	8	89%	5	56%	9	100%	8	89%	5	56%
9 W	public	8	6	75%	5	63%	5	63%	5	63%	6	75%	3	38%	5	63%	6	75%	7	88%	6	75%	5	63%
9 INT	private	3	1	33%	1	33%	1	33%	1	33%	2	67%	3	100%	2	67%	2	67%	3	100%	3	100%	3	100%
10 N	public	20	18	90%	19	95%	19	95%	16	80%	13	65%	20	100%	16	80%	13	65%	16	80%	15	75%	9	45%
10 W	public	5	4	80%	3	60%	4	80%	3	60%	3	60%	3	60%	3	60%	3	60%	3	60%	4	80%	3	60%
10 INT A	private	15	5	33%	3	20%	4	27%	4	27%	7	47%	7	47%	5	33%	6	40%	5	33%	5	33%	3	20%
10 INT B	private	18	5	28%	7	39%	6	33%	6	33%	4	22%	1	6%	1	6%	1	6%	1	6%	2	11%	1	6%
10 INT C	private	9	5	56%	4	44%	4	44%	5	56%	3	33%	4	44%	3	33%	3	33%	2	22%	0	0%	0	0%
10 INT D	private	7	4	57%	4	57%	5	71%	2	29%	4	57%	5	71%	5	71%	5	71%	2	29%	2	29%	2	29%
11 W	public	2	1	50%	1	50%	2	100%	2	100%	2	100%	2	100%	2	100%	2	100%	1	50%	0	0%	0	0%
11 INT	private	16	9	56%	9	56%	10	63%	11	69%	11	69%	13	81%	11	69%	12	75%	13	81%	1	6%	0	0%
12 E	public	9	8	89%	7	78%	5	56%	5	56%	5	56%	5	56%	4	44%	3	33%	4	44%	4	44%	4	44%
13 S	public	4	3	75%	2	50%	4	100%	4	100%	1	25%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
13 W	public	9	6	67%	3	33%	5	56%	6	67%	5	56%	5	56%	5	56%	3	33%	3	33%	3	33%	3	33%
13 INT	private	13	9	69%	6	46%	3	23%	6	46%	7	54%	8	62%	2	15%	3	23%	0	0%	1	8%	0	0%
14 N	public	4	3	75%	3	75%	4	100%	3	75%	4	100%	3	75%	3	75%	3	75%	3	75%	2	50%	1	25%
14 S	public	8	6	75%	8	100%	8	100%	6	75%	7	88%	8	100%	7	88%	6	75%	7	88%	5	63%	4	50%
14 E	public	11	7	64%	10	91%	9	82%	6	55%	6	55%	7	64%	9	82%	5	45%	8	73%	9	82%	7	64%

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			10:00 AM		11:00 AM		12:00 PM		1:00 PM		2:00 PM		3:00 PM		4:00 PM		5:00 PM		6:00 PM		7:00 PM		8:00 PM	
14 W	public	8	6	75%	7	88%	7	88%	6	75%	7	88%	7	88%	6	75%	5	63%	6	75%	5	63%	5	63%
15 N	public	10	6	60%	9	90%	10	100%	10	100%	10	100%	9	90%	8	80%	6	60%	6	60%	7	70%	9	90%
15 S	public	14	5	36%	7	50%	14	100%	13	93%	12	86%	11	79%	7	50%	8	57%	6	43%	8	57%	8	57%
15 W	public	10	5	50%	9	90%	10	100%	10	100%	8	80%	5	50%	10	100%	7	70%	9	90%	8	80%	6	60%
15 INT A	private	47	20	43%	22	47%	24	51%	27	57%	27	57%	21	45%	17	36%	17	36%	12	26%	8	17%	8	17%
15 INT B	private	8	3	38%	2	25%	6	75%	2	25%	7	88%	7	88%	3	38%	2	25%	1	13%	1	13%	1	13%
16W	public	23	10	43%	11	48%	17	74%	17	74%	16	70%	18	78%	10	43%	7	30%	6	26%	3	13%	1	4%
16 INT	private	6	0	0%	0	0%	0	0%	0	0%	2	33%	1	17%	1	17%	5	83%	5	83%	3	50%	0	0%
17 E	public	6	6	100%	6	100%	4	67%	3	50%	3	50%	3	50%	3	50%	1	17%	1	17%	1	17%	1	17%
18 N	public	5	5	100%	5	100%	2	40%	3	60%	3	60%	1	20%	0	0%	0	0%	0	0%	0	0%	0	0%
18 S	public	8	6	75%	3	38%	4	50%	4	50%	4	50%	5	63%	5	63%	2	25%	2	25%	2	25%	0	0%
18 INT A	private	20	16	80%	17	85%	9	45%	9	45%	11	55%	11	55%	6	30%	6	30%	7	35%	8	40%	5	25%
18 INT B	private	15	9	60%	11	73%	8	53%	7	47%	5	33%	8	53%	8	53%	7	47%	6	40%	6	40%	3	20%
19 N	public	8	6	75%	8	100%	8	100%	6	75%	8	100%	6	75%	7	88%	7	88%	7	88%	8	100%	3	38%
19 S	public	8	0	0%	8	100%	8	100%	4	50%	6	75%	5	63%	4	50%	8	100%	8	100%	8	100%	8	100%
19 E	public	5	1	20%	2	40%	5	100%	4	80%	5	100%	2	40%	4	80%	4	80%	4	80%	3	60%	5	100%
19 INT A	public	35	18	51%	29	83%	35	100%	27	77%	26	74%	23	66%	19	54%	25	71%	29	83%	32	91%	25	71%
19 INT B	private	16	3	19%	8	50%	7	44%	5	31%	9	56%	7	44%	6	38%	6	38%	6	38%	6	38%	4	25%
20 N	public	10	4	40%	4	40%	5	50%	10	100%	4	40%	2	20%	1	10%	4	40%	6	60%	5	50%	7	70%
20 S	public	14	4	29%	5	36%	10	71%	9	64%	6	43%	5	36%	4	29%	5	36%	5	36%	5	36%	5	36%
20 W	public	9	2	22%	6	67%	9	100%	8	89%	7	78%	5	56%	6	67%	8	89%	7	78%	8	89%	7	78%
20 INT A	private	20	4	20%	4	20%	5	25%	5	25%	4	20%	4	20%	4	20%	3	15%	4	20%	4	20%	1	5%
20 INT B	private	32	25	78%	28	88%	24	75%	29	91%	22	69%	19	59%	20	63%	15	47%	9	28%	6	19%	5	16%
21W	public	3	2	67%	0	0%	1	33%	1	33%	0	0%	0	0%	2	67%	1	33%	0	0%	1	33%	0	0%
22 E	public	10	7	70%	4	40%	5	50%	6	60%	5	50%	6	60%	3	30%	1	10%	1	10%	1	10%	0	0%
23 INT A	private	30	4	13%	4	13%	9	30%	6	20%	9	30%	11	37%	7	23%	5	17%	12	40%	16	53%	5	17%
23 INT B	private	14	7	50%	9	64%	8	57%	9	64%	8	57%	8	57%	7	50%	4	29%	2	14%	2	14%	2	14%
24 N	public	3	0	0%	3	100%	3	100%	2	67%	3	100%	1	33%	3	100%	3	100%	3	100%	3	100%	3	100%
24 E	public	4	0	0%	0	0%	3	75%	0	0%	0	0%	0	0%	0	0%	1	25%	1	25%	0	0%	2	50%
24 INT A	public	33	11	33%	16	48%	28	85%	24	73%	12	36%	10	30%	14	42%	24	73%	25	76%	26	79%	28	85%
24 INT B	public	7	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
25 N	public	13	3	23%	4	31%	9	69%	10	77%	6	46%	5	38%	6	46%	5	38%	7	54%	6	46%	8	62%
25 W	public	4	0	0%	1	25%	3	75%	3	75%	1	25%	2	50%	2	50%	3	75%	4	100%	4	100%	4	100%
25 INT A	private	23	9	39%	10	43%	8	35%	9	39%	9	39%	8	35%	2	9%	0	0%	0	0%	0	0%	0	0%
25 INT B	private	28	7	25%	6	21%	6	21%	7	25%	9	32%	6	21%	5	18%	0	0%	0	0%	0	0%	0	0%
Total		**864**	**432**	**50%**	**479**	**55%**	**531**	**61%**	**515**	**60%**	**479**	**55%**	**458**	**53%**	**409**	**47%**	**381**	**44%**	**368**	**43%**	**345**	**40%**	**286**	**33%**
			50%		**55%**		**61%**		**60%**		**55%**		**53%**		**47%**		**44%**		**43%**		**40%**		**33%**	
	public	432	236	55%	280	65%	332	77%	312	72%	269	62%	255	59%	251	58%	243	56%	260	60%	255	59%	229	53%
			55%		65%		77%		72%		62%		59%		58%		56%		60%		59%		53%	
	private	432	196	45%	199	46%	199	46%	203	47%	210	49%	203	47%	158	37%	138	32%	108	25%	90	21%	57	13%

ZIONSVILLE | Downtown Market Study + Parking Analysis

PARKING UTILIZATION COLLECTION FORM

Satuday, September 14, 2013

Block Face / Location	Type	No. Spaces	Occupied Spaces																					
			10:00 AM		11:00 AM		12:00 PM		1:00 PM		2:00 PM		3:00 PM		4:00 PM		5:00 PM		6:00 PM		7:00 PM		8:00 PM	
1 INT	private	10	3	30%	5	50%	5	50%	3	30%	2	20%	2	20%	2	20%	2	20%	2	20%	2	20%	2	20%
2 E	public	16	6	38%	9	56%	8	50%	11	69%	12	75%	11	69%	7	44%	8	50%	10	63%	11	69%	9	56%
3W	public	12	6	50%	5	42%	8	67%	8	67%	7	58%	7	58%	9	75%	7	58%	6	50%	7	58%	7	58%
4 S	public	4	1	25%	4	100%	3	75%	2	50%	3	75%	2	50%	1	25%	1	25%	0	0%	0	0%	1	25%
4 W	public	2	2	100%	2	100%	2	100%	2	100%	1	50%	1	50%	1	50%	0	0%	1	50%	1	50%	1	50%
4 INT	private	3	3	100%	3	100%	2	67%	1	33%	1	33%	2	67%	1	33%	1	33%	1	33%	1	33%	1	33%
5E	public	9	7	78%	8	89%	8	89%	6	67%	7	78%	4	44%	6	67%	7	78%	7	78%	8	89%	8	89%
5 INT A	private	14	5	36%	6	43%	7	50%	5	36%	5	36%	3	21%	3	21%	2	14%	1	7%	1	7%	1	7%
5 INT B	private	13	2	15%	5	38%	5	38%	5	38%	6	46%	3	23%	2	15%	3	23%	3	23%	2	15%	2	15%
5 S	public	1	1	100%	1	100%	1	100%	1	100%	1	100%	0	0%	1	100%	1	100%	1	100%	2	200%	1	100%
6 E	public	7	5	71%	6	86%	4	57%	7	100%	6	86%	4	57%	3	43%	2	29%	6	86%	5	71%	5	71%
6 S	public	3	3	100%	3	100%	2	67%	1	33%	2	67%	2	67%	3	100%	3	100%	3	100%	3	100%	3	100%
6 INT A	private	8	2	25%	3	38%	3	38%	3	38%	3	38%	1	13%	0	0%	0	0%	0	0%	0	0%	0	0%
6 INT B	private	22	12	55%	10	45%	8	36%	6	27%	7	32%	8	36%	6	27%	4	18%	3	14%	2	9%	3	14%
7 N	public	3	1	33%	2	67%	3	100%	2	67%	3	100%	2	67%	1	33%	0	0%	1	33%	1	33%	0	0%
7 S	public	11	8	73%	5	45%	6	55%	9	82%	8	73%	4	36%	2	18%	2	18%	4	36%	6	55%	6	55%
7 W	public	8	6	75%	6	75%	7	88%	6	75%	7	88%	1	13%	6	75%	5	63%	6	75%	4	50%	5	63%
7 INT A	private	18	11	61%	10	56%	9	50%	9	50%	9	50%	9	50%	6	33%	4	22%	4	22%	3	17%	3	17%
7 INT B	private	4	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
8 N	public	3	3	100%	3	100%	3	100%	2	67%	2	67%	2	67%	2	67%	2	67%	4	133%	3	100%	3	100%
8 E	public	9	4	44%	5	56%	4	44%	4	44%	3	33%	5	56%	7	78%	7	78%	7	78%	7	78%	8	89%
9 N	public	5	3	60%	3	60%	4	80%	2	40%	4	80%	2	40%	2	40%	4	80%	3	60%	3	60%	4	80%
9 E	public	9	2	22%	6	67%	4	44%	5	56%	6	67%	6	67%	7	78%	7	78%	7	78%	8	89%	7	78%
9 W	public	8	1	13%	2	25%	2	25%	3	38%	5	63%	2	25%	5	63%	5	63%	6	75%	6	75%	8	100%
9 INT	private	3	2	67%	2	67%	3	100%	2	67%	3	100%	3	100%	3	100%	3	100%	3	100%	3	100%	3	100%
10 N	public	20	16	80%	11	55%	17	85%	15	75%	15	75%	9	45%	7	35%	10	50%	12	60%	12	60%	13	65%
10 W	public	5	4	80%	4	80%	4	80%	4	80%	4	80%	3	60%	4	80%	3	60%	4	80%	3	60%	4	80%
10 INT A	private	15	4	27%	6	40%	6	40%	10	67%	8	53%	6	40%	7	47%	7	47%	5	33%	5	33%	5	33%
10 INT B	private	18	4	22%	7	39%	7	39%	4	22%	5	28%	7	39%	5	28%	2	11%	2	11%	2	11%	2	11%
10 INT C	private	9	1	11%	2	22%	1	11%	1	11%	2	22%	2	22%	1	11%	1	11%	0	0%	0	0%	0	0%
10 INT D	private	7	1	14%	1	14%	1	14%	2	29%	1	14%	1	14%	1	14%	1	14%	1	14%	1	14%	1	14%
11 W	public	2	2	100%	2	100%	1	50%	1	50%	2	100%	2	100%	2	100%	1	50%	0	0%	0	0%	0	0%
11 INT	private	16	9	56%	9	56%	8	50%	4	25%	1	6%	1	6%	1	6%	0	0%	0	0%	0	0%	0	0%
12 E	public	9	4	44%	5	56%	4	44%	4	44%	4	44%	5	56%	3	33%	2	22%	3	33%	3	33%	5	56%
13 S	public	4	3	75%	2	50%	2	50%	1	25%	2	50%	1	25%	1	25%	1	25%	1	25%	2	50%	2	50%
13 W	public	9	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%	3	33%	4	44%	3	33%	3	33%	5	56%
13 INT	private	13	3	23%	3	23%	2	15%	2	15%	1	8%	2	15%	1	8%	1	8%	1	8%	1	8%	1	8%
14 N	public	4	4	100%	3	75%	4	100%	4	100%	2	50%	3	75%	4	100%	3	75%	3	75%	2	50%	2	50%
14 S	public	8	7	88%	5	63%	8	100%	8	100%	5	63%	5	63%	3	38%	6	75%	8	100%	8	100%	8	100%

ZIONSVILLE | Downtown Market Study + Parking Analysis

PARKING UTILIZATION COLLECTION FORM

Satuday, September 14, 2013

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			10:00 AM		11:00 AM		12:00 PM		1:00 PM		2:00 PM		3:00 PM		4:00 PM		5:00 PM		6:00 PM		7:00 PM		8:00 PM	
14 E	public	11	6	55%	8	73%	8	73%	9	82%	10	91%	5	45%	6	55%	4	36%	10	91%	9	82%	11	100%
14 W	public	8	5	63%	6	75%	5	63%	6	75%	6	75%	6	75%	6	75%	5	63%	6	75%	6	75%	5	63%
15 N	public	10	7	70%	7	70%	7	70%	7	70%	9	90%	8	80%	7	70%	6	60%	5	50%	7	70%	7	70%
15 S	public	14	10	71%	10	71%	6	43%	6	43%	11	79%	11	79%	5	36%	5	36%	6	43%	6	43%	5	36%
15 W	public	10	8	80%	9	90%	7	70%	8	80%	9	90%	9	90%	9	90%	9	90%	10	100%	9	90%	8	80%
15 INT A	private	47	11	23%	15	32%	20	43%	16	34%	17	36%	14	30%	14	30%	11	23%	11	23%	10	21%	7	15%
15 INT B	private	8	3	38%	0	0%	2	25%	2	25%	6	75%	7	88%	6	75%	3	38%	1	13%	1	13%	1	13%
16W	public	23	13	57%	12	52%	15	65%	12	52%	20	87%	18	78%	19	83%	12	52%	9	39%	7	30%	3	13%
16 INT	private	6	4	67%	4	67%	4	67%	1	17%	1	17%	3	50%	2	33%	1	17%	1	17%	1	17%	0	0%
17 E	public	6	1	17%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
18 N	public	5	1	20%	2	40%	1	20%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
18 S	public	8	6	75%	6	75%	0	0%	2	25%	2	25%	3	38%	1	13%	0	0%	0	0%	0	0%	0	0%
18 INT A	private	20	6	30%	6	30%	1	5%	3	15%	2	10%	2	10%	1	5%	1	5%	0	0%	0	0%	0	0%
18 INT B	private	15	7	47%	9	60%	0	0%	2	13%	1	7%	1	7%	1	7%	1	7%	1	7%	1	7%	1	7%
19 N	public	8	3	38%	5	63%	7	88%	7	88%	6	75%	4	50%	5	63%	7	88%	8	100%	8	100%	8	100%
19 S	public	8	0	0%	0	0%	8	100%	5	63%	4	50%	4	50%	6	75%	7	88%	4	50%	8	100%	7	88%
19 E	public	5	5	100%	4	80%	3	60%	4	80%	4	80%	5	100%	2	40%	4	80%	4	80%	4	80%	5	100%
19 INT A	public	35	32	91%	32	91%	34	97%	31	89%	25	71%	26	74%	20	57%	22	63%	19	54%	29	83%	27	77%
19 INT B	private	16	7	44%	8	50%	11	69%	11	69%	8	50%	7	44%	4	25%	3	19%	2	13%	2	13%	1	6%
20 N	public	10	4	40%	8	80%	8	80%	9	90%	7	70%	7	70%	4	40%	3	30%	2	20%	5	50%	7	70%
20 S	public	14	12	86%	10	71%	7	50%	7	50%	6	43%	4	29%	0	0%	3	21%	5	36%	7	50%	5	36%
20 W	public	9	9	100%	7	78%	7	78%	5	56%	4	44%	5	56%	3	33%	7	78%	8	89%	9	100%	5	56%
20 INT A	private	20	11	55%	4	20%	3	15%	6	30%	4	20%	2	10%	1	5%	0	0%	0	0%	0	0%	0	0%
20 INT B	private	32	14	44%	13	41%	13	41%	14	44%	11	34%	11	34%	11	34%	8	25%	6	19%	5	16%	6	19%
21W	public	3	3	100%	3	100%	3	100%	0	0%	0	0%	0	0%	2	67%	1	33%	0	0%	0	0%	1	33%
22 E	public	10	7	70%	6	60%	4	40%	3	30%	3	30%	2	20%	0	0%	0	0%	0	0%	0	0%	0	0%
23 INT A	private	30	18	60%	12	40%	8	27%	10	33%	8	27%	10	33%	12	40%	9	30%	8	27%	14	47%	9	30%
23 INT B	private	14	3	21%	3	21%	0	0%	5	36%	3	21%	2	14%	2	14%	2	14%	2	14%	4	29%	2	14%
24 N	public	3	0	0%	0	0%	3	100%	2	67%	3	100%	2	67%	3	100%	3	100%	3	100%	3	100%	2	67%
24 E	public	4	4	100%	4	100%	1	25%	3	75%	0	0%	0	0%	0	0%	2	50%	1	25%	2	50%	2	50%
24 INT A	public	33	0	0%	0	0%	16	48%	15	45%	9	27%	8	24%	12	36%	23	70%	27	82%	24	73%	22	67%
24 INT B	public	7	13	186%	13	186%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
25 N	public	13	13	100%	10	77%	10	77%	10	77%	4	31%	4	31%	3	23%	2	15%	7	54%	7	54%	4	31%
25 W	public	4	4	100%	3	75%	4	100%	4	100%	3	75%	2	50%	2	50%	3	75%	4	100%	3	75%	3	75%
25 INT A	private	23	14	61%	7	30%	4	17%	4	17%	4	17%	4	17%	2	9%	2	9%	1	4%	1	4%	1	4%
25 INT B	private	28	5	18%	7	25%	5	18%	1	4%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Total		**864**	**430**	**50%**	**427**	**49%**	**411**	**48%**	**395**	**46%**	**375**	**43%**	**330**	**38%**	**300**	**35%**	**291**	**34%**	**303**	**35%**	**323**	**37%**	**304**	**35%**
	public	432	265	61%	267	62%	273	63%	263	61%	256	59%	217	50%	205	47%	219	51%	244	56%	261	60%	252	58%
	private	432	165	38%	160	37%	138	32%	132	31%	119	28%	113	26%	95	22%	72	17%	59	14%	62	14%	52	12%

APPENDIX

Business Attraction - Applying Market Study Results

Business Attraction: Applying Market Study Results

Unique Benefits of a Downtown Zionsville Location

- Markets: Opportunities exist on two levels—
  - For new businesses providing goods and services in specific retail categories according to recent survey results
  - For downtown's current businesses to increase sales and consider either expansion or a new business concept.
- Customers: Access to high-income, highly educated households with significant spending power. With 33% of the Town's population under 20 years of age, these same households are truly in their highest spending years.
- Strong Co-tenants: Downtown's Zionsville's businesses include some of the Indianapolis region's savviest independent retailers.
- Daytime Market Growth: Nearby Creekside Corporate Park at Zionsville is just one example of the local commitment to increasing the daytime population. In addition to Zionsville's current employee numbers, the survey results noted indicate over 30% of respondents work from home at least one day per week.
- Authenticity: Visitors and residents cite downtown Zionsville as that 'real, authentic' place to enjoy shopping, dining, and unique special events.

Retail Attraction Targets

Market data indicates those business categories with the greatest business potential for downtown Zionsville:

- Eating and drinking, particularly casual sit-down formats
- Specialty foods
- Home accessories
- Women's apparel
- Active living, such as running or bike stores

The first four categories allow businesses considering a downtown Zionsville location to supplement existing business clusters, making them even stronger.

According to survey results, Zionsville residents routinely patronize 23 regional retailers within the active living category; most are independent retailers.

Demographics

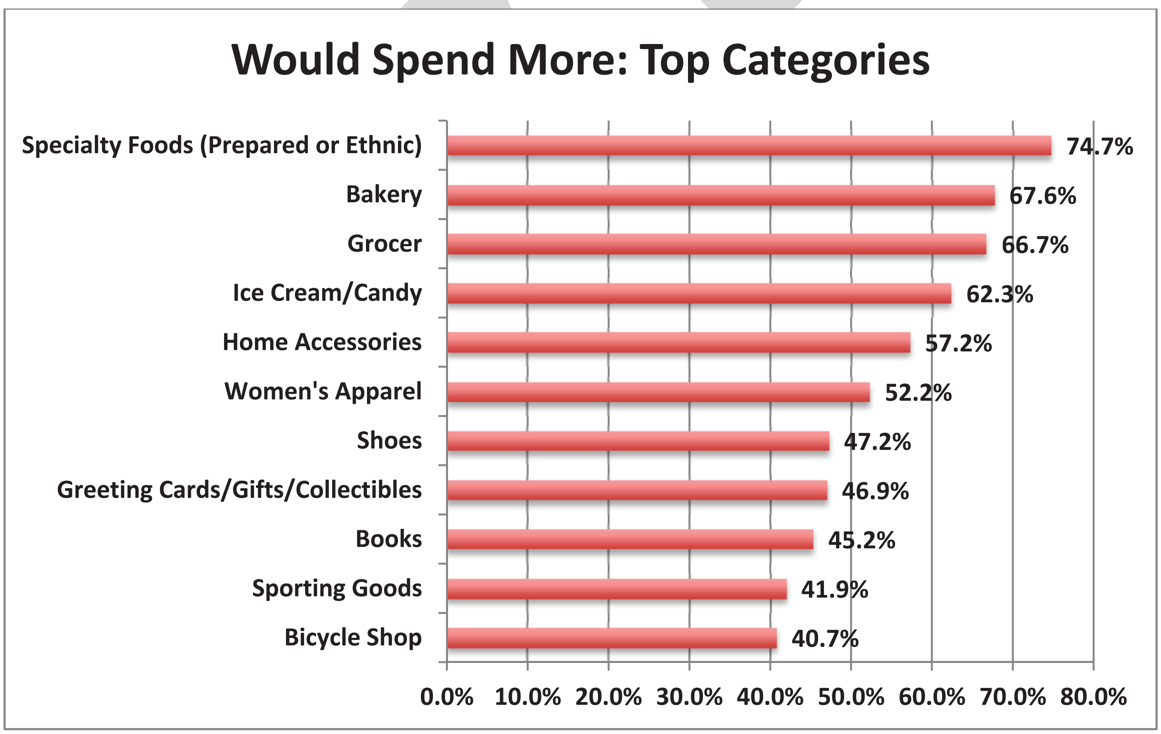
	Town of Zionsville	15 Minutes	Indianapolis MSA
Total Population	24,159	126,231	1,818,674
Median Age	39.6	36.3	35.7
Employees	10,522	99,711	793,207
% Bachelor's Degree or Greater	67.3%	53.2%	31.10%
Average Household Income	$143,469	$109,334	$73,662
Median Household Income	$101,712	$69,620	$52,704
Per Capita Income	$50,768	$43,019	$28,784
Estimated Consumer Expenditures	$246,422,014	$1,392,926,386	$16,730,257,622

Recent Survey Results

In recent survey results, 30.4% of total respondents spend $100 or more per week. An additional 18.2% of respondents spend $75 or more per week on meals away from home.

77.5% of respondents would patronize additional casual dining options in downtown Zionsville. Casual dining is defined as full service restaurants with a family-oriented menu.

Survey respondents indicated they would 'spend more' in each of these business categories if added to downtown Zionsville.



Business Support

- Information specific to incentives and recent process
- The Town, the Zionsville Chamber, and their business partners work to ensure that businesses find a downtown Zionsville location suitable to their needs, and most importantly, a location where the business owner can make money.
- Commitment to small business growth within the downtown area.

APPENDIX

Downtown Event Evaluation Criteria

Downtown Event Evaluation Criteria

Overall Evaluation Measurements

- Attendance: Who and how many? This includes the understanding of the sources for the attendance numbers, for example police estimates or tickets sold.
- Vendor, Participant or Merchant Attitudes: How did they feel about the image created for the district/event? Did they feel the event generated sufficient recognition and awareness for the district? How well did the logistics of the event work? What needs to be improved?
- Specific to Vendors and/or Participants: Did the vendors or participants receive a return through sales and/or local exposure?
- Sales Volume (only if retail sales was an objective of the event)
- Media Value for Sponsors: Did sponsors receive sufficient coverage? Social media and results?
- Extenuating Circumstances: Was there an issue, such as weather, that affected the above?

Evaluations for each event should consider multi-year periods, typically the previous 3-5 years. If the event is new, generally a two-year trial period should be the basis for determining event continuation to identify those segments of the event that work.

Attendance Measurements

- Pedestrian Counts: Counts at random locations and different times.
- Parking Volumes: Calculating number of cars and approximate number of people per car. Parking lot data for the event data and/or hourly counts in the closest lots may be used.
- Crowd Photos: Many organizations use photos to instantly document crowd levels for later counting, usually applying technology.
- Police Estimates: For larger events, local police departments often provide crowd estimates
- Exit Surveys (brief—6 or fewer questions): As attendees leave, survey them for residence or zip code, basic demographic information, how they learned of the event, reason for attending, and length of attendance.
- Coupons or Tickets: if used, coupons or tickets generally provide quite accurate attendance numbers.

Attitude Measurements

- Surveys: Merchants and attendees can be surveyed about their opinions of the event. Like the Exit Survey, all surveys noted for these purposes should be six (6) questions or less.
- Feedback to Organization Staff: Provide evaluation forms for volunteers, entertainers, vendors, sponsors, government officials, and nearby businesses to obtain feedback on the event.
- Events Logistics: Identify problems and strengths. Discuss ways to alter the event in the future and note the anticipated positive outcomes from these changes for subsequent event evaluations.
- Electronic and Social Media: Monitor comments and analytics for comments posted on organization-related pages and sponsor pages, as appropriate.
- Overall Evaluation: Did the event meet its original objectives as determined by organization staff and the Marketing Committee? Does the organization want to implement the event again? For

existing events with results from multiple years, can this event be improved, or expanded, to achieve greater results--sales, attendance, and/or awareness? Does the time and cost, assuming positive answers to these questions, justify continuing the event?

Estimated Sales Volumes

- Selected Merchant Surveys: Identify the group of businesses most affected by any event. (For example, if an event is held on one particular block. The ground floor businesses on that block should be asked for input.) Ask them to compare sales during the event with sales on a normal day. Surveys should be no more than five (5) questions. If responses are low, staff should either call or visit to solicit input. Most important, inform them in advance of the event that the organization wants their observations.
- Exit Surveys at parking, exit, or transportation areas: Ask people if they attended the retail events, made purchases, what and how much, and why or why not.

Sponsor or Participant Value Measurements

- Vendor, Participant or Merchant Surveys: Ask food, beverage, product, or service vendors about similar sales comparisons. This category could also include restaurants with sidewalk cafes located near an event venue.
- Cost and Value: For sponsors, ask about cost and value of their sponsorship, given attendance, how the attendees matched their target markets, and the estimated buying power of those markets, if appropriate.
- Product/Sponsor Awareness: As appropriate for that event, survey questions on any exit surveys of attendees or participants to identify sponsors.
- Event Reporting: Prepare an event report for any sponsors including attendance numbers, any attendee demographic data based upon surveys, assessment of value, summary of all media results and analytics, and photographs showing their visibility.