

# CROSS PLAINS MARKET ANALYSIS



2017

Community-led research to support business development efforts

Prepared by the Cross Plains Area Chamber of Commerce,  
the Village of Cross Plains, and the University of Wisconsin–Extension  
August 3, 2017



**UW**  
**Extension**

University of Wisconsin-Extension

Dane County UW-Extension, and  
Center for Community and Economic Development

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Prepared by the Cross Plains Area  
Chamber of Commerce and  
the University of Wisconsin-Extension

## PURPOSE OF STUDY

The purpose of this market analysis is to compile and interpret information useful in economic development efforts. This study focuses on the following:

- identifying retail, restaurant and service business market opportunities
- strengthening existing businesses
- attracting new businesses that meet the community needs
- improving resident and visitor experiences
- improving the physical environment
- developing community marketing & branding initiatives

This project represents a community-led initiative whereby local business and community leaders were actively involved in the research and analysis. They participated as a “study team” that met regularly to review and interpret data gathered from the market analysis.



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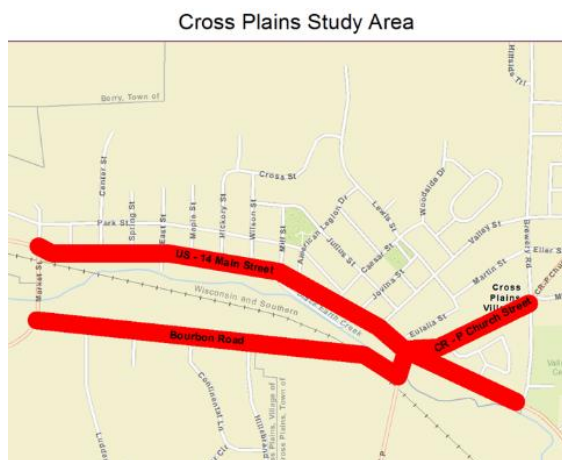
# CROSS PLAINS MARKET ANALYSIS

## EXECUTIVE SUMMARY – AUGUST 2017

### STUDY AREA DEFINED

The Study Area follows US-14, Main Street from the east to the west edges of the Village and Bourbon Road from Church Street (CR-P) to Market Street. Highway US-14 extends through the entire Village and serves as a corridor for businesses. Additionally, County Road-P, Church Street is included in order to capture Glaciers Edge Square, an outdoor shopping center anchored by Piggly Wiggly.

### Traffic Volume

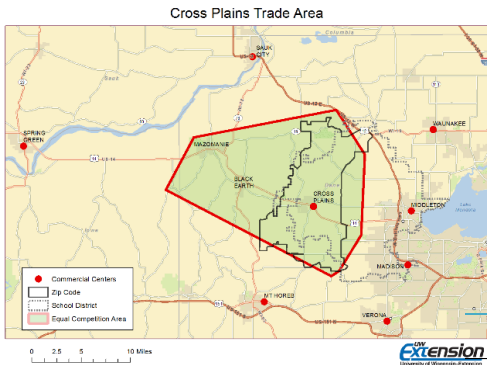


**The most traveled area segments of the Study Area are along US-14 with up to 12,000 vehicles per day. For comparison, US-14 in Middleton has an average daily traffic count of 21,000.**

### Market Segments Served

- Residents of the Trade Area: This is by far the largest and most important market segment in the community. The availability of businesses have a direct impact on quality of life.
- Workers: The inflow of workers to a community increases the daytime population.
- Visitors: Both leisure and business, visitors traveling to or through Cross Plains provide additional sales to businesses.

There are approximately 105,000 square feet of retail and restaurant space representing 18 businesses in the study area. Not included are many professional and personal services ranging from banks and insurance to health care.



## TRADE AREA

Cross Plains is located in southern Wisconsin, approximately 14 miles west of Madison. It is located in western Dane County in an area of residential growth. Highway US-14 connects the Village to Madison and larger connector highways.

EXHIBIT 1: DEMOGRAPHICS OF RESIDENTS RESIDING IN THE TRADE AREA

## MARKET CHARACTERISTICS

### Residents of Trade Area

- Population of 14,213 and growing
- Most housing is owner-occupied
- Incomes much higher than county, state or U.S
- High percent college educated

### Workers

- Plastic ingenuity is the largest employer (350 Emp.) Followed by various retail and service businesses.
- 1,115 people commute to Cross Plains for work. 2,155 residents commute outside of Cross Plains for work.

### Visitors

- Business travelers include those interacting with established local businesses.
- Cross Plains is a stopping point for travelers taking a more scenic route from Chicago or Milwaukee to La Crosse or the Twin Cities.
- Weekend travelers to the community often include art enthusiasts, hikers, cyclists, and fishers.
- Visitors are often friends and family of local residents.

### Demographic Comparison

	Cross Plains Equal Competition TA	Cross Plains Zip Code- 53528	Dane County	Wisconsin	U.S.
<b>Population</b>					
2010 Population	13,685	5,510	488,073	5,686,986	308,745,538
2015 Population	14,213	5,658	507,522	5,742,139	318,536,439
% Annual Change '10-'15	0.8%	0.5%	0.8%	0.2%	0.6%
<b>Households</b>					
2010 Households	5,247	2,155	203,750	2,279,768	116,716,292
2015 Households	5,475	2,238	213,669	2,323,302	120,746,349
% Change '10-'15	0.9%	0.8%	1.0%	0.4%	0.7%
2015 Avg. HH Size	2.59	2.53	2.32	2.41	2.57
<b>Housing</b>					
2010 Owner Occupied	76.2%	73.6%	56.2%	59.1%	57.7%
2010 Renter Occupied	19.4%	21.8%	38.1%	27.7%	30.8%
2010 Vacant or Seasonal	4.4%	4.5%	5.7%	13.1%	11.4%
<b>Median HH Income</b>					
2015 HH Income	\$ 76,642	\$ 78,560	\$ 60,428	\$ 52,390	\$ 53,217
<b>Per Capita Income</b>					
2015 Per Capita Income	\$ 41,531	\$ 37,298	\$ 33,670	\$ 27,779	\$ 28,597
<b>Household Composition</b>					
2010 HH w/ children	34.5%	34.8%	28.4%	30.6%	33.4%
<b>2010 Population by Age</b>					
Median Age	41.0	40.4	34.5	38.4	37.1
18 +	74.4%	74.5%	78.3%	76.4%	76.0%
<b>2010 Race and Ethnicity</b>					
White	96.3%	97.4%	84.7%	86.2%	72.4%
Black	0.6%	0.5%	5.2%	6.3%	12.6%
Asian	1.4%	0.5%	4.7%	2.3%	4.8%
Other	1.7%	1.6%	5.4%	5.2%	10.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Hispanic	1.7%	1.6%	5.9%	5.9%	16.3%
<b>2015 Education</b>					
Population Age 25+	9,796	3,910	332,511	3,885,748	214,026,813
% Bachelors degree of higher	40.1%	38.3%	28.3%	28.3%	30.0%
<b>Tapestry Segmentation for Cross Plains Eq. Comp. TA</b>					
	Percent of 2015 HH				
Parks and Rec (5C)	31.4%	30.6%			
Green Acres (6A)	19.70%	13.80%			
Soccer Moms (4A)	18.30%	44.80%			
Other	30.60%	10.80%			

Source: ESRI Market Profile, Tapestry Segmentation Area Profile and Business Analyst Online. For educational use.

\* Zip Code data is from Business Analyst online and the year 2016

## SURVEY RESEARCH

Given that there were three different surveys administered (residents, business owners, and visitors), there were various differences as follows:

- 1) Residents emphasized business development that primarily serves community residents and builds a sense of community cohesion. Residents identified a retail and restaurant mix that allow residents to shop locally and expand restaurant and service opportunities. Residents also identified the importance of incorporating playgrounds and family gathering spaces within the Retail Development Area.
- 2) Business owners indicated that they see the need to bring more workers into the community during weekday and business hours, in order to support the local retail and service businesses that are currently operating. Business owners suggested that recruiting a large employer would be a big boost to existing entities.
- 3) Recreational visitors expressed strong sentiments that business and retail development could not be at the expense of the local environment. Often times construction (due to development) adversely affects stream quality because it leads to erosion, sedimentation, and consequently restricted stream flow and warming of the water in the Black Earth Creek, a world class trout stream. These visitors indicated that protection of natural resources was their highest priority, and that business development must be consistent with this value.

## COMPARISON COMMUNITIES

Mount Horeb, Lake Mills, and Cambridge were chosen as having vibrant downtowns. The following are findings that may be transferable to Cross Plains.

- An anchor business such as Duluth Trading Company in Mount Horeb contributes significantly to the customer volume coming into town.
- A designated economic development organization, partnering with the Chamber of Commerce and local government, leads to better implementation of goals.
- The physical look of a business district has a direct impact on the attraction to the community.
- Coffee shops tend to serve as important gathering places for rural communities.

## ANALYSIS OF RETAIL AND RESTAURANT DEMAND AND SUPPLY

The following table presents demand and supply in square feet and in number of businesses. These estimates are based on the U.S. Census and other sources obtained by UW-Extension, CCED. Categories highlighted in blue have a negative gap (demand greater than supply).

Demand & Supply Gap Analysis							
NAICS	Description (excluding most large format stores)	S.F. DEMAND	S.F. SUPPLY	S.F. GAP	BUS. DEMAND	BUS. SUPPLY	BUS. GAP
442	Furniture and home furnishings stores	4,122	-	(4,122)	1	-	(1)
443	Electronics and appliance stores	1,048	-	(1,048)	0	-	(0)
444 Adj.	Building material and garden w/o Home Ctr	7,796	13,000	5,204	1	2	1
445	Food and beverage stores	25,334	32,000	6,666	3	2	(1)
446	Health and personal care stores	9,041	19,000	9,959	3	3	0
447	Convenience Stores in Gas stations (excluding gas)	5,929	7,000	1,071	2	1	(1)
448	Clothing and clothing accessories stores	-	-	-	-	-	-
451	Sporting goods, hobby, musical, and book stores	5,467	4,000	(1,467)	1	1	0
452 Adj.	Gen Merch. w/o warehouse and supercenters	3,622	13,000	9,378	0	1	1
453	Miscellaneous store retailers	5,769	-	(5,769)	2	-	(2)
7224	Drinking places (alcoholic beverages)	3,096	1,000	(2,096)	1	1	(0)
722511	Full-service restaurants	18,247	8,000	(10,247)	6	3	(3)
722513	Limited-service restaurants	13,370	7,000	(6,370)	6	3	(3)
722515	Snack and nonalcoholic beverage bars	5,126	1,000	(4,126)	2	1	(1)
	Total Retail	68,129	88,000	19,871	15	10	(5)
	Total Food and Drink	39,839	17,000	(22,839)	14	8	(6)
	Blue categories - demand is greater than supply						

Note: The supply of retail space exceeds demand because it includes a large implement dealership and full-size grocery store in the study area.



## RECOMMENDATIONS-IN-BRIEF

### Business Retention and Expansion

1. The Business Development Committee, in partnership with the Village Board, establish a strategic, "Comprehensive Business Development Plan" for the retail area.
2. Increase Chamber-led community/business marketing and communication efforts to promote local businesses.
3. Establish a "Shop Local Campaign" to encourage residents to increase patronage of local retail and restaurants.
4. Focus on bringing people into the downtown retail area through events.
5. Consider establishing a Business Retention and Expansion program.

### Business Attraction

1. Determine whether it is feasible to create and support a separate Economic Development Corporation (EDC) or Economic Development Professional.
2. Focus business recruitment efforts on three different segments: residents, outdoor recreation, and new base employers.
3. Promote Cross Plains as a good place to do business.
4. Develop an inventory of open spaces and buildings that are available.
5. Develop entrepreneurship programs and resources.
6. Educate the community on business development opportunities and its impact on: property taxes, quality of life, and sustainability and natural resource conservation.

### Resident and Visitor Experience

1. Develop a business and non-business mix that caters both to the needs of residents and recreational visitors who come to the area.
2. Improve the physical infrastructure, parking options, area aesthetics, and signage.
3. Work with business-owners to build a sense of hospitality and to welcome guests in such a way as to build loyalty and return visits.
4. Enhance relationships with local organizations to address the broader issue of community-wide connectivity.
5. Design to be a walkable community, with accessible sidewalks throughout the Retail Development Area.
6. Increase recreation opportunities and activities.

### Improving the Physical Environment

1. Enhance aesthetics of the Retail Development Area to be consistent with a cohesive downtown brand.
2. Use the "Comprehensive Business Development Plan" as guidance for identifying appropriate business locations.
3. Promote walkability and access to natural resources and green spaces.

### Marketing and Branding Strategies

1. Create an ad hoc committee to develop a community "brand" for the Village of Cross Plains.
2. Consider creating a "niche" for the broader region, possibly related to natural resources and/or health and wellness.
3. Implement marketing efforts to promote the community "brand" and area "niche."

### Organizing for Action

1. The Chamber will share the results of the Market Analysis with stakeholders through online and printed reports and meetings including the Village Board, Chamber members, and the public.
2. The Chamber will collaborate with the Village Board to determine organizational structure and implementation strategies.
3. Enhance communications among the Chamber, the Village Board, residents and businesses.
4. Define roles for the Village Board, the Chamber, and other entities regarding business development.
5. Develop partnerships with local, civic organizations.
6. Develop strategies that create community cohesion by encouraging residents to take on leadership roles on planning committees, attending events, and supporting local business.

### Market Opportunities

The following opportunities were based on demand and supply calculations, survey results, peer community visits, and consumer characteristics of local residents.

#### Restaurants

Casual dining establishments that are family-friendly, serve a range of healthy foods at moderate prices, and have ambiance

Ethnic restaurants (non-chain), in particular an authentic Mexican and a high-end Italian

Healthy, local food restaurants with local ownership, reflecting the farm-to-table trend

Microbreweries with food that can appeal to families, and young adults

Fine dining that can appeal to people with high disposable incomes, and draw visitors

Fast food/Takeout establishments, both at the high end and lower end

#### Retail

Hardware store. Plans for a new hardware store are underway

A small general merchandise store, a thrift store, and health and wellness-focused retail

Small independent stores that would appeal to visitors and enhance the small-town feel such as art galleries, bookstores, bakery, specialty foods, and hobby/craft shops

Specialty clothing store (sporting, boutique, or second-hand/vintage)

Stores that appeal to recreational visitors: Sporting goods stores (e.g., focused on hiking, biking) and a fly shop (fishing equipment)

#### Services

Residents expressed interest in services that meet their needs:

- Spa & salon
- Health and wellness center
- Car wash
- Visitor lodging

#### Gathering Spaces

Destinations that provide community residents with opportunities to gather and recreate (e.g., community center, art center/studio, and places for indoor recreational activities for young people).

## SECTION 1: INTRODUCTION

*This section describes the purpose and goals of the study, prior research, and members of the study team who contributed to this community-led initiative.*

### **Purpose and Goals of Study**

Cross Plains and its commercial districts have experienced significant change since the prior University of Wisconsin – Extension market analysis (conducted in 2006–2007).



Specifically, major highway improvements were made preserving traffic flow while improving the aesthetic character of the roadway. A strategic plan and design standards were implemented. New real estate development is underway, including the addition of multifamily and single-family housing. A Chamber of Commerce was established in 2008 with a clear role in economic development.

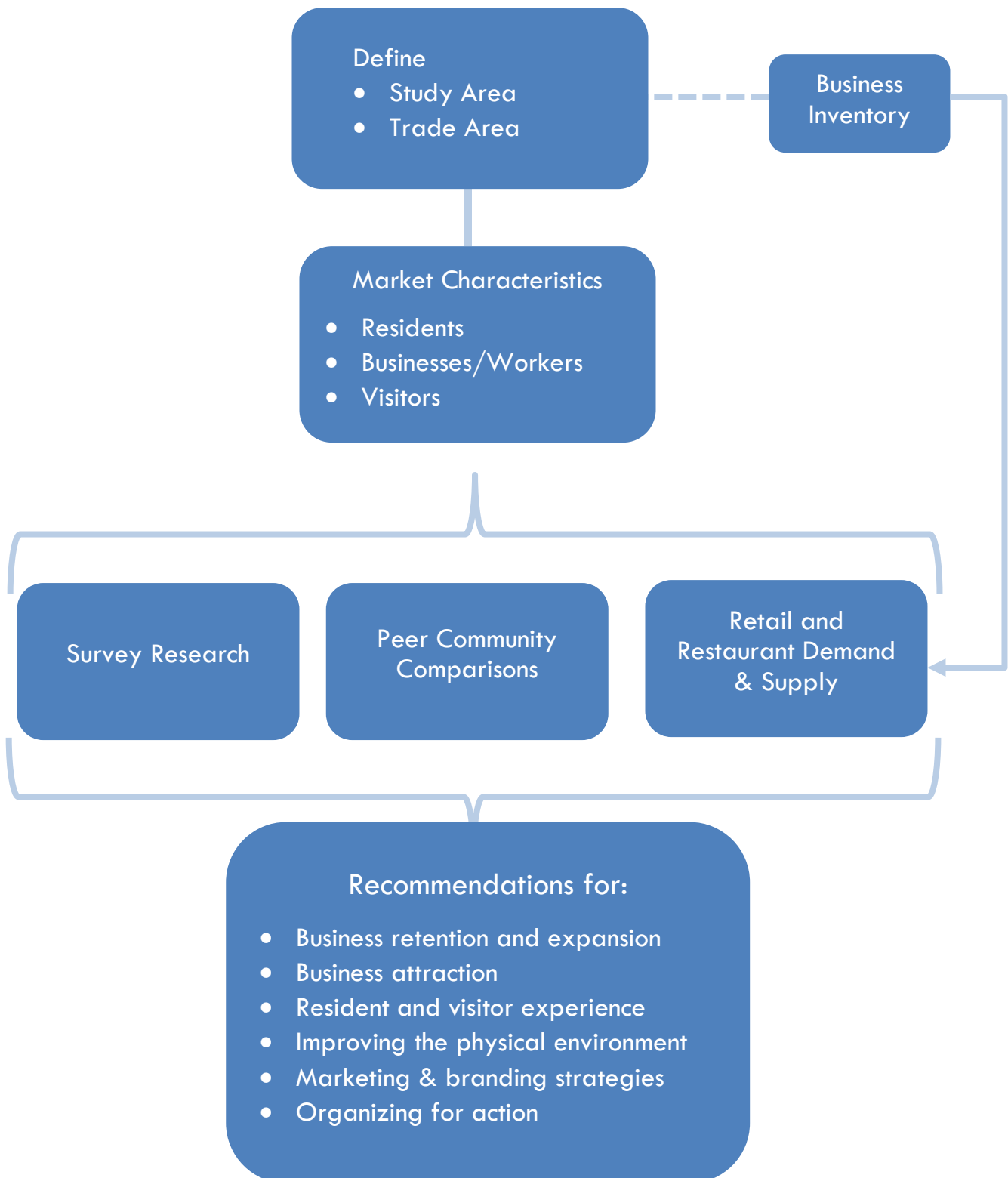
The market analysis for Cross Plains provides current and objective information on the consumer and competitive environment in order to inform business development initiatives. Accordingly, the analysis focuses on identifying the key market segments to be served, needs and preferences of these segments, and whether the current business mix is adequately serving the segments. Recommendations by the study team are made to guide the community's business retention, expansion, and attraction efforts. The data assembled in this analysis support a list of business development priorities. This report and its executive summary are intended to be actively used in economic development efforts.

The purpose of this community-led market analysis is to compile and interpret information useful in economic development efforts. This study focuses on the following:

- identifying retail, restaurant and service business market opportunities
- strengthening existing businesses
- attracting new businesses that meet the community needs
- improving resident and visitor experiences
- improving the physical environment
- developing community marketing & branding initiatives

This project represents a community-led initiative whereby local business and community leaders were actively involved in the research and analysis. They participated as a “study team” that met periodically (sometimes every two weeks) to review and interpret data gathered from the market analysis. A flowchart illustrating the sequence of events in this project is presented on the next page.

Exhibit 1.1: Market Analysis Process





## Community History

The Village of Cross Plains is situated on what was once a rich, well-watered prairie surrounded by bluffs, and abundant in wildlife. In its beginnings two military roads and a railroad crossed on this grassy plain; one from Galena to Fort Winnebago and the other from Prairie du Chien to Green Bay, and the Chicago-Milwaukee-St. Paul railway.

Three Villages grew up around this crossing. The first was Cross Plains, platted by the Baer Brother's around 1850 in the area around St. Francis Catholic Church. In 1856, P.L. Mohr platted a second Village named for his wife Christina, in what is now the eastern part of the community. Abijah Fox platted Foxville in 1857, in what is now the western part of the Village, around where he had built the railroad depot the year prior. By 1880, early industry in the three communities included mills, blacksmiths, grocers and general stores, lumberyards, wagon makers and harness shops, and multiple saloons. In 1876, Louis Saeman established the Saemen Lumber Co., which today is the oldest continuously operated family business in town. In 1886, St. Martin's Lutheran Church was erected on Brewery Street in Christina, and though it no longer houses the congregation, the original building can still be seen. H.M. Zander built his creamery and general store in Foxville in 1906, and, in 1907, the Village's first bank – the State Bank of Cross Plains – was formed.

By 1920, the three communities were combined as the Village of Cross Plains. The means by which the Village of Cross Plains came to occupy the geographic footprint it does today is an important concept to remember when assessing today's market. What we know from our history is that we have a Village that grew up along roadways and railroads, and originated from three separate original communities, leaving us with three separate and distinct commercial areas.

## Prior Research

### **Wisconsin Business Retention & Expansion Study, MG&E/Village/WI Department of Commerce 2005-2006**

The purpose of the study was to create a confidential, comprehensive data profile on businesses in the community to help retention and expansion efforts. Business leaders in the community were interviewed on their current business success and hardships. The recommendation from the study provide assistance and develop programs for local business. This lead to the creation of the Chamber of Commerce.

### **Cross Plains Market Analysis, University Wisconsin-Extension, 2006-2007**

The Market Analysis showed numerous possibilities and gaps within the Village. The study suggested that Cross Plains should adopt a niche-based approach to retail development, improve upon physical layout challenges to enhance developing retail continuity and create a local economic development organization. Potential opportunities for Cross Plains at the time were family restaurant/casual dinner house, brewpub, or coffeehouse/bakery.

### **Village of Cross Plains, Strategic Planning Process, Executive Summary, 2007**

The purpose of this document was to supplement the Village's comprehensive plan by creating a single vision for Cross Plains and help guide the comprehensive plan's implementation. By 2025, Cross Plains aims to be a safe, clean and prosperous Village with a diverse mix of housing options. Additionally, the Village will continue to expand preservation efforts while also creating a more inclusive transportation model for pedestrians, bicyclists and cars.

## **Village of Cross Plains Comprehensive Plan, 2008**

This comprehensive plan was created to help the Village guide short-range and long-range growth and development. The plan looked at multiple aspects of growth, development, and land-use. Some key areas in economic development at the time were: establish a business park, recruit new retail and service businesses to meet the needs of residents, and create new cohesive design standards for new businesses.

## **Cross Plains Downtown Design Standards, MSA Professional Services, 2008**

The Cross Plains Main Street Design Standards were developed to improve and protect the appearance, value, and function of properties in the district. The guidelines are intended to allow for creativity and variety within a framework of basic design parameters that will lead to a successful, sustainable urban environment including the protection of Black Earth Creek. The design standards were created with assistance from MSA Professional Services, Inc.

## **Cross Plains Downtown Revitalization Plan, MSA Professional Services, 2008**

The Revitalization Plan was done in conjunction with the Cross Plains Main Street Design Standards. The research was mainly focused around parking on Main Street/Hwy 14 through the Village. It was determined that with plan growth that sufficient parking would need to come along with it. The plan also covered the topics of storm water management and the Zander Property Report.

## **Community Growth and Projections Report, MDR Consulting, 2016**

This report provides the Village with an understanding of how recent growth and future projected growth will affect new development projects and student enrollment in public schools. Cross Plains will continue to see an increase in housing units and student enrollment over the next ten years and possibly beyond; however, student enrollment is expected to increase at a lower rate than past recent years. Housing units will continue to rise due to limited amount of land and future projects are predicted to be additional multifamily units due to low vacancy rates.

## **Cross Plains Area Chamber of Commerce, 2016 Board Action Plan**

Cross Plains Area Chamber of Commerce strategic plan looked at improving community support & involvement, business development, networking, and communication. Important goals included attracting new businesses to Cross Plains, quarterly lunch and learns, and a community Ice Age Trail event.

## **Study Team**

The market analysis is a product of a local study team of the Cross Plains Area Chamber of Commerce's Business Development Team, working with the Village of Cross Plains, Dane County UW-Extension, and the University of Wisconsin – Extension Center for Community and Economic Development. The study team provided local insight and was instrumental in developing locally relevant conclusions and recommendations from the data collected.

The study team in this project include a broad range of knowledgeable and committed community and business leaders as listed below.

- Mary Devitt - Crossroads Coffeehouse
- Amy Hansen - Cross Plains Area Chamber of Commerce
- Tom Johnson - Wisconsin Newspaper Association
- Casey Koenig - Thompson Kane & Company, LLC
- Bob Lange - Ice Age Trail Alliance
- Jim Nonn - Culvers of Cross Plains

- Michael Roessler - CENTURY 21 Affiliated-Roessler
- Caitlin Stene - Village of Cross Plains
- Ben Swanson - State Bank of Cross Plains
- Sharon Lezberg, Dane County-University of Wisconsin Extension
- Bill Ryan, University of Wisconsin-Extension, Center for Community and Economic Development
- Technical assistance by Emily Lutz, Graduate Student Assistant, University of Wisconsin



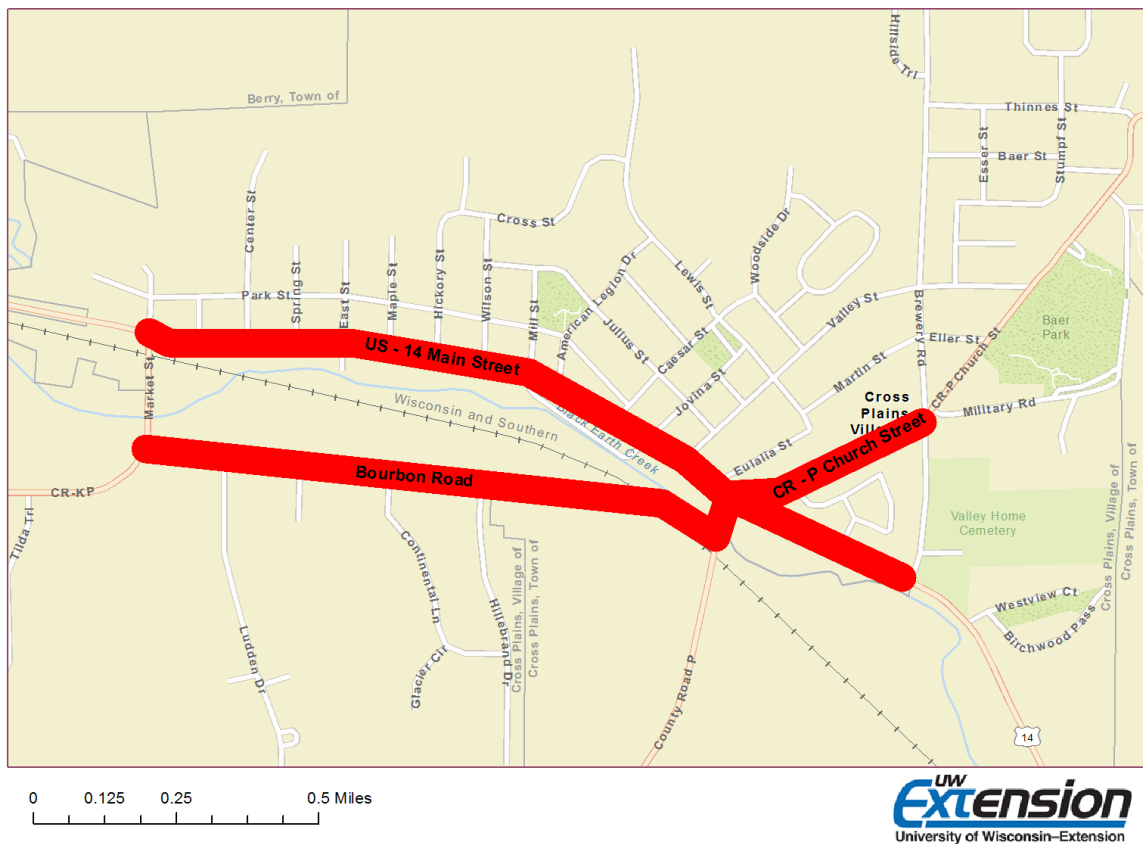
## SECTION 2: STUDY AREA

This section describes the extent of the Retail Development Area, referred to here as the Study Area. This area represents the locations of most current and future commercial activity in the community and the focus of this study.

### Study Area Defined

The Study Area follows US-14, Main Street from the east to the west edges of the Village and Bourbon Road from Church Street (CR-P) to Market Street. Highway US-14 extends through the entire Village and serves as a corridor for businesses. Additionally, County Road-P, Church Street is included in order to capture Glaciers Edge Square, an outdoor shopping center anchored by Piggly Wiggly.

Exhibit 2.1: Map of the Study Area  
Cross Plains Study Area



## Current Retail and Restaurant Business Mix

The Study Area includes 18 retail and restaurant businesses representing approximately 105,000 square feet of space. This does not include a future hardware store planned for the west side of the Study Area. The Study Area's square feet is skewed by fairly large store footprints at the implement dealership and the grocery store. Without these two businesses, the Study Area would have closer to 60,000 square feet. This data, collected through a retail and restaurant inventory, is referred to later in the report in the calculations of demand and supply.

Exhibit 2.2: 2017 Retail and Restaurant Mix in Study Area

NAICS Code	NAICS Description	Cross Plains Study Area	Sq. Footage Total - CP
442	Furniture and home furnishings stores	-	-
443	Electronics and appliance stores	-	-
444 Adj.	Building material and garden w/o Home Ctr	2	13,000
445 Adj.	Food and beverage stores	2	32,000
446	Health and personal care stores	3	19,000
447	Convenience Stores in Gas stations (excluding gas)	1	7,000
448	Clothing and clothing accessories stores	-	-
451	Sporting goods, hobby, musical, and book stores	1	4,000
452 Adj.	Gen Merch. w/o warehouse and supercenters	1	13,000
453	Miscellaneous store retailers	-	-
7224	Drinking places (alcoholic beverages)	1	1,000
722511	Full-service restaurants	3	8,000
722513	Limited-service restaurants	3	7,000
722515	Snack and nonalcoholic beverage bars	1	1,000
	Total Retail and Restaurants	18	105,000

*Note: building material and garden w/o home centers includes three businesses and roughly 15,000 ft.<sup>2</sup>. These businesses include an implement dealer, lumber (excluding yard), and a floor covering store.*

Not included in the above business inventory are many service businesses that line Main Street and Bourbon Road. There are approximately 35 personal and professional service firms ranging from banks to insurance to health clinics.

While not inside the Study Area, there are retail and restaurant operations in both Black Earth and Mazomanie. These communities together have an additional 21 retail and restaurant businesses, representing approximately 46,000 ft.<sup>2</sup>

Accordingly, the entire Trade Area has approximately 40 retail and restaurant businesses representing approximately 150,000 ft.<sup>2</sup> These statistics will be used later in an analysis of demand and supply.



## Consumer Segments

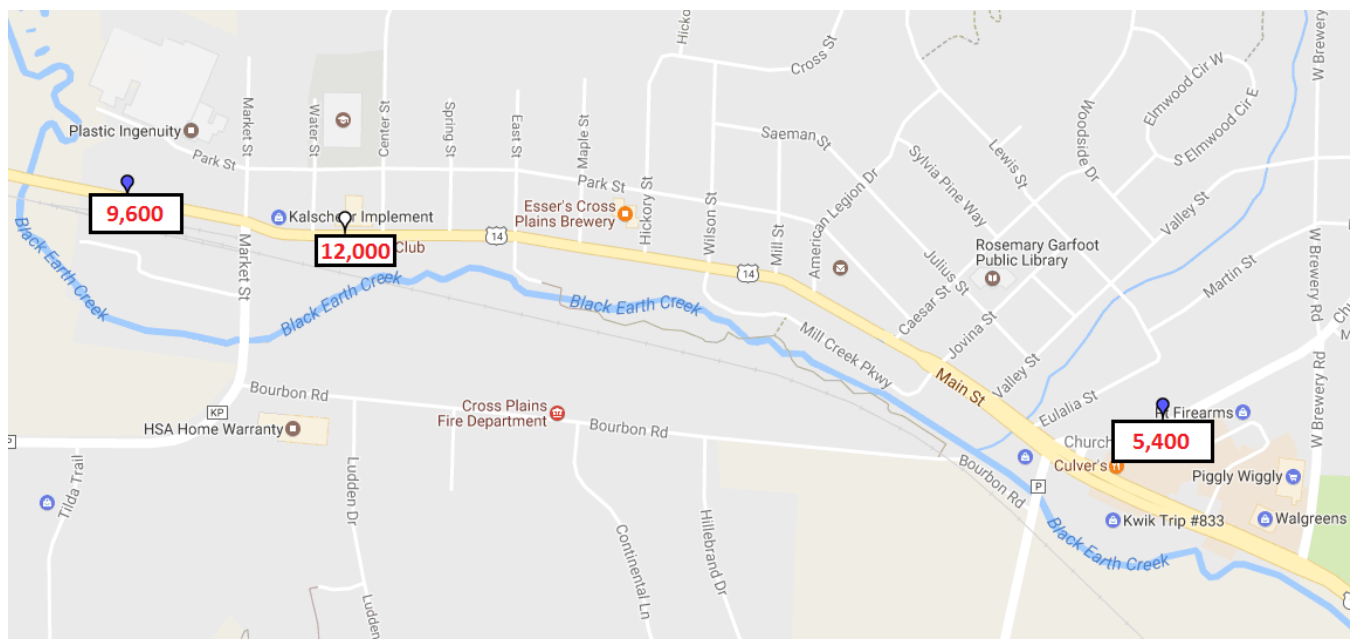
Three primary market segments comprise the customer base served by Study Area businesses. These segments are explored in more detail later in this report. They include:

- Residents of the Trade Area (defined in next section)- This is by far the largest and most important market segment in the community. The availability of and satisfaction with retail, restaurants, and services have a direct impact on local quality of life. While there are many business choices in Middleton and Madison, the availability of goods and services right in Cross Plains is an important convenience factor that most residents value. It should be noted that although this analysis is focused on the residents of the Village of Cross Plains, a significant number of Trade Area residents live outside of the Village.
- Workers – The inflow of workers to a community represents an important segment that increases the daytime workforce population. It represents employees who “commute-in” and may have time during the day to visit the Retail Development Areas for purposes of eating, shopping, or services.
- Visitors – both leisure and business - visitors traveling to or through Cross Plains are important as they provide additional sales to businesses that provide an authentic and convenient stop. Leisure travelers include enthusiasts who fly-fish, hike, and explore the outdoors. Others seek arts and culture in communities along the US 14 corridor to Spring Green and beyond. Furthermore, these travelers include friends and relatives of community residents.

## Traffic Volume

The average daily traffic count is the number of vehicles that pass a given location on an average annual basis. The most traveled area segments of the Study Area are along US-14 with up to 12,000 vehicles per day (Wisconsin Department of Transportation interactive traffic map). County Road-P, Church Road also has a notable traffic count of 5,400 vehicles. In comparison, US-14 in Middleton has an average daily traffic count of 21,000.

Exhibit 2.3: Traffic Counts



Source: <https://trust.dot.state.wi.us/roadrunner/>

## SECTION 3: TRADE AREA

*This section analyzes the size and shape of the Trade Area. Trade Area boundaries defined here will serve as the basis for additional analysis later in this report.*

Cross Plains is located in southern Wisconsin, approximately 14 miles west of Madison. It is located in western Dane County in an area of residential growth. Highway US-14 connects the Village to Madison and larger connector highways. Cross Plains is six miles west of Middleton, a rapidly growing suburb of Madison with significant retail, restaurant, and service businesses. Included in Middleton are major employers, various retail centers, numerous hotels and a Costco warehouse store.

### Trade Area Defined

A Trade Area is the geographic area from which a community generates, or could generate, approximately 75% of its customers. Knowing the size and shape of the Trade Area is very important because its boundaries allow for measurement of the number of potential customers, their demographics, and their spending potential.

Each individual business in a community has a unique Trade Area. The distinct Trade Area for an establishment will depend on factors ranging from the type of business to the variety of products and services sold. Certain business types will only attract local customers, while other categories have the potential to draw customers from a broader region. For purposes of this analysis, the focus is on local customers as reflected in a “convenience Trade Area.” In addition to serving local customers, there is some demand from nonresidents including in-commuting workers and visitors.

A convenience Trade Area is typically based on the purchase of products and services needed on a regular basis, such as gasoline, groceries, and hair care. Because these purchases are relatively frequent, consumers usually find it more convenient to buy these products and services from businesses located close to their home or workplace.

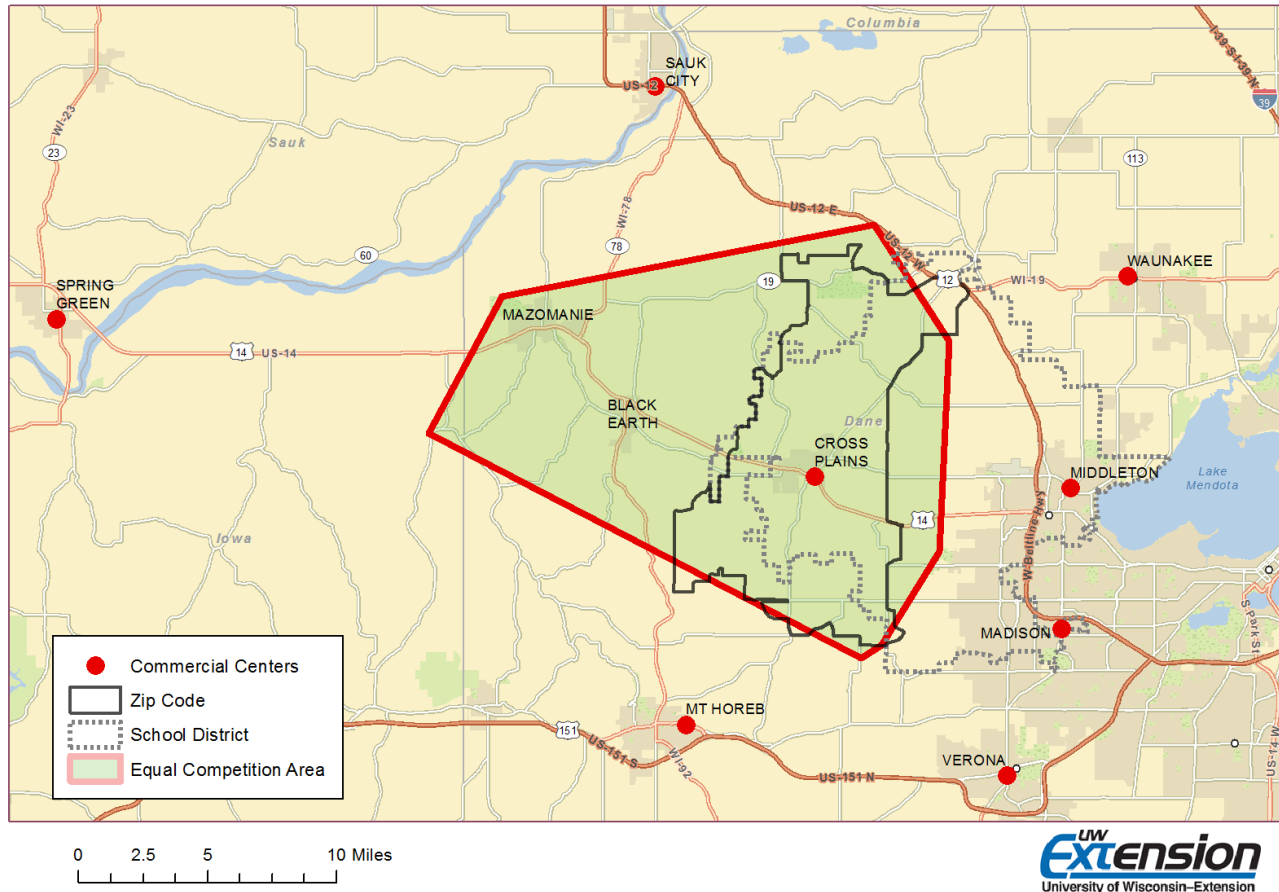
### Equal Competition Area

To define the Convenience Trade Area, an “equal competition area” was used. This method is simply formed by lines drawn exactly halfway between each of the competing commercial centers. Any point within the equal competition area is closer to the subject commercial center than any of the surrounding commercial centers.

The following map presents the Cross Plains Equal Competition Trade Area, as well as lines illustrating the local ZIP Code and the Middleton-Cross Plains Area School District boundaries. It should be noted that the trade area was extended slightly to the West (closer to Spring Green) so that it could include the Village of Mazomanie. This was done to include this community as many of its residents and commuters pass through Cross Plains in route to destinations in Middleton or Madison.

Exhibit 3.1: Equal Competition Area (as Defined by Competing Grocery Stores)

## Cross Plains Trade Area

**Geographic keywords used throughout the market analysis:**

- **Retail Development Area** – as used in the surveys developed for this market analysis, refers to the Main Street and Bourbon Road retail areas. In the consumer survey section, the Glaciers Edge Square retail area is addressed separately.
- **Study Area** - same as the Retail Development Area
- **Business District** - same as the Retail Development Area
- **Trade Area** – the geographic area from which the Study Area generates the majority of its customers. For Cross Plains, the Trade Area reaches to the West as far as Mazomanie.

## SECTION 4: MARKET CHARACTERISTICS

The demographic and lifestyle characteristics of Trade Area residents provide information on who lives locally that could potentially generate demand for Study Area businesses. In addition, characteristics of commuters and visitors are also presented to describe the significance of these market segments.

### Residents

The population of the Village of Cross Plains was 3,758 in 2015. It has increased by 0.3% annually since 2010. The Village only represents 26.4% of the 14,213 Trade Area residents.

The following table describes characteristics of residents residing in the trade area. Comparison data is included for the local 53528 zip code area, Dane County, Wisconsin and the U.S. to explore the uniqueness of local consumers.

Exhibit 4.1: Demographic Comparison Report

	Demographic Comparison				
	Cross Plains Equal Competition TA	Cross Plains Zip Code- 53528	Dane County	Wisconsin	U.S.
<b>Population</b>					
2010 Population	13,685	5,510	488,073	5,686,986	308,745,538
2015 Population	14,213	5,658	507,522	5,742,139	318,536,439
% Annual Change '10-'15	0.8%	0.5%	0.8%	0.2%	0.6%
<b>Households</b>					
2010 Households	5,247	2,155	203,750	2,279,768	116,716,292
2015 Households	5,475	2,238	213,669	2,323,302	120,746,349
% Change '10-'15	0.9%	0.8%	1.0%	0.4%	0.7%
2015 Avg. HH Size	2.59	2.53	2.32	2.41	2.57
<b>Housing</b>					
2010 Owner Occupied	76.2%	73.6%	56.2%	59.1%	57.7%
2010 Renter Occupied	19.4%	21.8%	38.1%	27.7%	30.8%
2010 Vacant or Seasonal	4.4%	4.5%	5.7%	13.1%	11.4%
<b>Median HH Income</b>					
2015 HH Income	\$ 76,642	\$ 78,560	\$ 60,428	\$ 52,390	\$ 53,217
<b>Per Capita Income</b>					
2015 Per Capita Income	\$ 41,531	\$ 37,298	\$ 33,670	\$ 27,779	\$ 28,597
<b>Household Composition</b>					
2010 HH w/ children	34.5%	34.8%	28.4%	30.6%	33.4%
<b>2010 Population by Age</b>					
Median Age	41.0	40.4	34.5	38.4	37.1
18 +	74.4%	74.5%	78.3%	76.4%	76.0%
<b>2010 Race and Ethnicity</b>					
White	96.3%	97.4%	84.7%	86.2%	72.4%
Black	0.6%	0.5%	5.2%	6.3%	12.6%
Asian	1.4%	0.5%	4.7%	2.3%	4.8%
Other	1.7%	1.6%	5.4%	5.2%	10.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Hispanic	1.7%	1.6%	5.9%	5.9%	16.3%
<b>2015 Education</b>					
Population Age 25+	9,796	3,910	332,511	3,885,748	214,026,813
% Bachelors degree of higher	40.1%	38.3%	28.3%	28.3%	30.0%
<b>Tapestry Segmentation for Cross Plains Eq. Comp. TA</b>					
	Percent of 2015 HH				
Parks and Rec (5C)	31.4%	30.6%			
Green Acres (6A)	19.70%	13.80%			
Soccer Moms (4A)	18.30%	44.80%			
Other	30.60%	10.80%			

Source: ESRI Market Profile, Tapestry Segmentation Area Profile and Business Analyst Online. For educational use.

\* Zip Code data is from Business Analyst online and the year 2016

## Population

Population helps quantify both current market size and future market growth, both of which are used to measure the direction of consumer demand. Population is defined as all persons living in a geographic area. The population of the Trade Area was 14,213 in 2015. This reflects an annual change of .8% since 2010. This rate of change is consistent with Dane County, and above both Wisconsin and the US.

## Households

Households consist of one or more persons who live together, regardless of relationship, in the same housing unit. Households are characterized by size, composition, or stage in family life cycle. Typically, individuals or households as a group influence household purchases and generates demand. Projected household population growth may indicate future retail opportunities. Like population, households in the Trade Area are growing faster than Wisconsin and the US. Households. Average household size was 2.59 in 2015, above Dane County (2.32), Wisconsin (2.41) and the same as the US (2.59).

## Housing Ownership

Housing ownership is an important factor for retailers to consider as it directly correlates with expenditures for home furnishings and equipment. Furniture, appliances, hardware, paint, floor covering, garden centers and other home improvement products all prosper in active housing markets. The Trade Area had 76.2% of its housing units recorded as owner-occupied in 2010. This is much greater than Dane County, Wisconsin (56%) and the US (59%).

## Household Income and Per-Capita Income

Income can be an indicator of the spending power of residents. It positively correlates with retail expenditures in many product categories. Some retailers may also target specific income ranges based on their target market segment. Median household income in the Trade Area was \$76,642 in 2015, compared to approximately \$60,000 in Dane County, \$52,000 in Wisconsin, and \$53,000 in the US. Per capita Income is used to measure an area's average income. This is calculated by dividing the area's total income by its total population. The per capita income for the Trade Area was \$41,531 in 2015, also significantly higher than Dane County (\$33,670), Wisconsin (\$27,779), and the US (\$28,597). The affluence of the Trade Area is due in part to the development of many new, high-end suburban homes in formerly rural areas near Cross Plains.

## Age Profile

Age often affects a person's consumer tastes and preferences. Understanding the population's age distribution helps businesses effectively address the needs of the market. Accordingly, retail, service, and restaurants often target certain age groups. The Trade Area has a median age of 41.0, significantly higher than Dane County (34.5), Wisconsin (38.4), and the US (37.1). Interestingly, while the median age is high, the Trade Area also leads the comparison areas with the highest percentage of households with children (34.5%).

## Race/Ethnicity

Spending patterns often differ with ethnicity. Understanding the ethnic distribution of a population is the first step to meeting the needs of different groups. The Trade Area lacks diversity of race and ethnicity as it was 96.3% white in 2010.

## Education Attainment – Population of 25 and over

Education can be an indicator of the socio-economic status of an area. Not only do education levels affect income, they also impact consumer tastes and preferences. The Trade Area had 40.1% of its



population in 2015 having a baccalaureate degree or higher. This compares to Dane County (28.3%), Wisconsin (28.3%), and the US (30.0%).

## Lifestyles

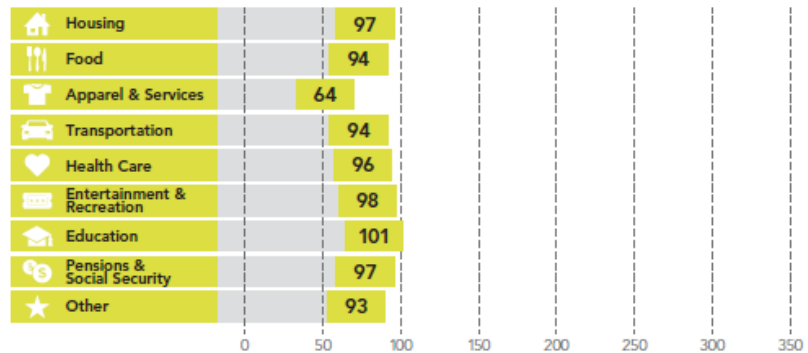
Trade Area residents can also be studied using lifestyle segmentation information. Lifestyle segmentation systems examine the buying habits and preferences of consumers in a geographic area. One lifestyle segmentation system is Tapestry™, by ESRI Business Information Solutions. Consumers are classified into 67 demographic and behaviorally distinct segments. The segments are based on type of neighborhood (urban, suburban, rural); the residents' socioeconomic status (age, income, occupation, type and value of residence); and their buying behaviors. The top three lifestyle tapestry segments in the Cross Plains Trade Area are presented below along with ESRI's descriptions of these segments.

### Parks and Rec - 31.4% of Trade

Area households: These practical suburbanites have achieved the dream of home ownership. They have purchased homes that are within their means. Their homes are older, and town homes and duplexes are common. Many of these families are two-income married couples approaching retirement age; they are comfortable in their jobs and their homes, budget wisely, but do not plan on retiring anytime soon or moving. Neighborhoods are established, as are the amenities and programs that supported their now independent children through school and college. The appeal of these kid-friendly neighborhoods is now attracting a new generation of young couples.

### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



- Cost and practicality come first when purchasing a vehicle; Parks and Rec residents are more likely to buy domestic SUVs or trucks over compact or subcompact vehicles.
- Budget-conscious consumers stock up on staples at warehouse clubs.
- Pass time at home watching documentaries on Animal Planet, Discovery, or History channels.
- For an outing, they choose to dine out at family-style restaurants and attend movies.
- Between trips to the casinos, they gamble on lottery tickets and practice their blackjack and poker skills online.
- Convenience is important in the kitchen; they regularly use frozen or packaged main course meals. Ground coffee is preferred over coffee beans.
- Residents here take advantage of local parks and recreational activities. Their exercise routine is a balance of home-based exercise; a session at their local community gym; or jog, swim, or run.

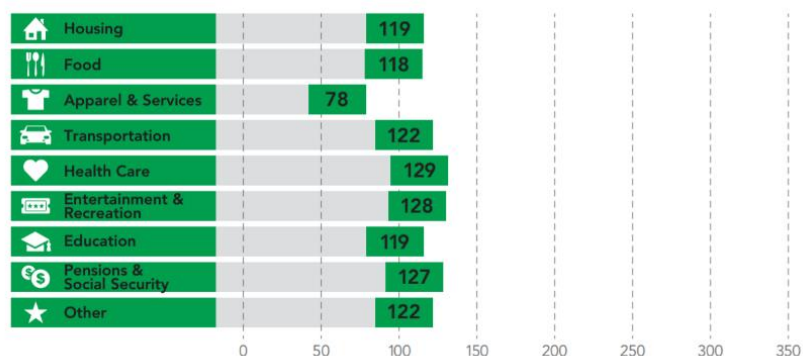
### Green Acres - 19.7% of Trade Area households:

The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.

- Purchase a variety of late model vehicles from trucks and SUVs to ATVs and motorcycles.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- Green Acres residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans clubs.

### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



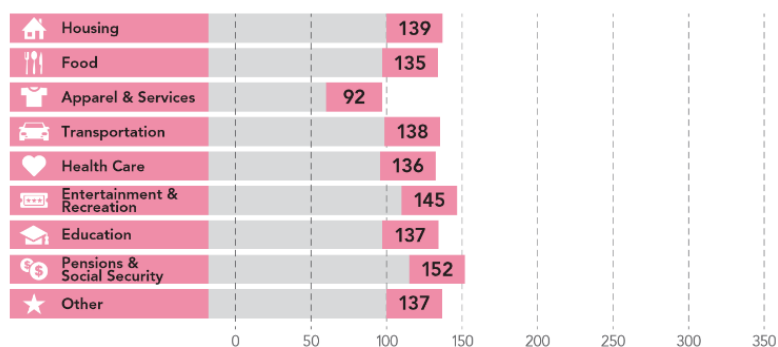
### Soccer Moms - 18.3% of Trade Area households: Affluent, family-oriented market with a country flavor.

Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

- Most households own at least two vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 165), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.

### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



## Workers

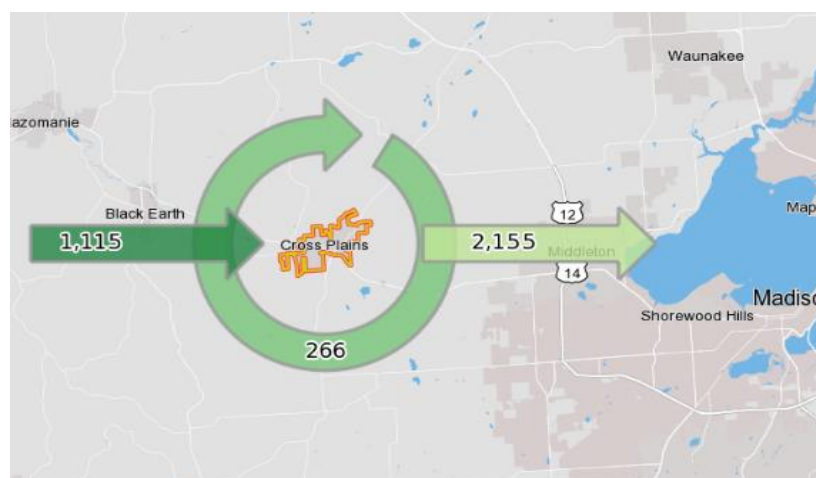
The larger employers in the Village of Cross Plains and their approximate employment (FTE and PT) are listed below (numbers from the Cross Plains Area Chamber of Commerce).

- Middleton-Cross Plains Area School District - 200 in Cross Plains (1,140 total District employees)
- Plastic Ingenuity - 350
- State Bank of Cross Plains - 87 in Cross Plains
- Village of Cross Plains - 68
- Piggly Wiggly - 60
- Culver's - 45
- Kwik Trip - 36
- Milestone Senior Living - 25
- Kalscheur Implement - 22
- Saint Francis Xavier Catholic School - 22
- Walgreens - 21
- UW Health Clinic - 21
- Kalscheur Dodge - 20

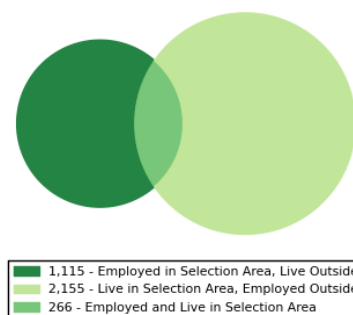
Worker inflow and outflow data, to and from the Village of Cross Plains, helps measure the significance of commuter potential spending in the community. Some employees may live in other communities with the potential to purchase within the Study Area during, before or after their work shift. Conversely, some employees may live in Cross Plains, but work elsewhere. Both groups of workers, those traveling to and those traveling from Cross Plains, offer spending potential to be captured.

The following map shows employees who come to work in Cross Plains, work outside of the Village boundaries, or who live and work within the Village. The orange polygon represents the boundary of Cross Plains. There are 1,115 employees who come to Cross Plains to work, but who live in a different area. Inversely, 2,155 people reside in the Village, but work in surrounding areas. Lastly, 266 people live and work in Cross Plains.

Note: The map shows arrows moving from West to East, but movement of employees and residents does not follow this pattern.



Inflow/Outflow Job Counts in 2014



Note: Overlay arrows do not indicate directionality of worker flow between home and employment locations

<http://onthemap.ces.census.gov/>

- ➡ Employed and Live in Selection Area
- ➡ Employed in Selection Area, Live Outside
- ➡ Live in Selection Area, Employed Outside

## Visitors

Visitors are defined as nonresidents who come to a community for business or leisure. They either make day trips, or stay overnight at local lodging or with friends and relatives. Other visitors include leisure-time travelers and those simply passing through the area. Cross Plains visitors often stop at the Crossroads Coffeehouse on Main Street in Cross Plains. At this coffeehouse, study team members talked with a random sample of travelers to learn why they are visiting the community. All of these groups have the potential to contribute to the local economy, but currently their spending on goods and services is limited, because of limited supply.

## Highway Travelers

Cross Plains is a stopping point for travelers from Chicago or Milwaukee heading to La Crosse, the Twin Cities, and other destinations. A scenic US highway goes right through the downtown business district. These travelers stop en-route to other destinations, and they view Cross Plains favorably. Summer season is especially high volume with destinations near Spring Green (theater, concerts, Taliesin).

## Hiking, Cycling, and Fishing Enthusiasts

Weekends in particular are filled with people recreating in the area. A recent article describing the “hidden gems” in Cross Plains shows that there is a statewide and broader interest in discovering new places to recreate. While theater, concerts, and Frank Lloyd Wright architecture attract travelers to Spring Green, the Ice Age geology and scenic beauty of the Cross Plains area entices people to stay or return. Cross Plains is a convenient stop for travelers because of its location halfway between Madison and Spring Green. Ice Age trail hikers and visitors are a key part of this group. The expansion of Dane County parks in this area is an invitation for more people to visit. Cross Plains was recently designated an Ice Age Trail community, and is part of the Frank Lloyd Wright trail, a self-guided architectural tour. Bicycling groups who love the challenging hills of the driftless area find Cross Plains a starting point to their evening and weekend rides. People who enjoy the challenge of fly-fishing often stop by Black Earth Creek (including Orvis customers and Trout Unlimited members) and are potential local customers. Many people from the Chicago area are thrilled that they discovered a little treasure in Cross Plains.

## Business Travelers

Cross Plains supports several existing businesses that bring travelers to town for the purpose of their occupations. Louis Saeman Sons Inc. has been bringing contractors to town for supplies since 1876, and Kalscheur Implement Co. is a regional hub of farm equipment sales and repair, serving the area’s surrounding agricultural communities. The growth of the State Bank of Cross Plains and the addition of Monona Bank suggest economic growth in the region. Both commercial and residential customers from out of the area come to town on a daily basis to address their financial needs. In addition, each of these financial businesses have multiple locations and regularly bring out-of-town employees to Cross Plains. Cross Plains also includes multiple service-based businesses – such as insurance providers, chiropractors, and dentists – that draw clients to town. Plastic Ingenuity is a plastics engineering and production firm with a plant in town that also regularly draws out-of-towners to the community. Business visitors represent an important market sub-segment and present an opportunity to capture corporate travel spending.

## SECTION 5: SURVEY RESEARCH

*The following section provides a brief summary of findings and analysis for each of three surveys. The record of open-ended question responses can be provided upon request.*

### Methodology

The market analysis study team felt it essential to get input from various stakeholder groups regarding the direction and type of business development appropriate for the community. To this end, the committee collectively wrote and administered three different surveys to assure responses from different user groups. All surveys were developed by the study team, with assistance from Dane County UW-Extension. Data was collected utilizing the Qualtric survey tool. In this analysis, demographic data of respondents has been omitted. The purpose of collecting demographic data is to assure that the survey respondent population reflects the total population of Cross Plains.

**Resident Survey:** The resident survey was announced through multiple channels, including: Cross Plains Area Chamber of Commerce, Middleton-Cross Plains Area School District and Village of Cross Plains contact lists, newsletters, e-mails, and website, Chamber Business Development Committee (BDC) e-mails, Cross Plains Memories Facebook page, and Moms and Dad of Cross Plains Facebook page, Next Door Cross Plains listserve, Northwest Dane Senior Services, hard copies at local businesses (including the library, Village office, grocery store, and coffeehouse, and Life Foundation members. A total of 585 people took the survey. Residents replied in great detail to open-ended survey questions, reflecting willingness to engage in public decision-making and care for community.

**Business Survey:** The business survey was administered for two reasons: to test whether area business owners had similar responses to residents on questions about the direction of business development and visions for the business development district, and to determine issues for local businesses and areas where the Chamber could provide assistance in business retention, expansion, and recruitment. The survey was distributed via e-mail list to Chamber members and the link was included in the channels listed above with the resident survey, BDC members followed up the e-mail request with personal phone. The business survey was completed by 51 respondents.

**Recreational Visitors Survey:** There are two populations important to Cross Plains that represent potential consumers/clients for retail, restaurant or service businesses - visitors and commuters. These populations are difficult to capture for survey purposes. While recognizing that there are a several reasons people come to Cross Plains, the study team focused on natural resource recreational visitors, for a variety of reasons:

- 1) These visitors can be surveyed through organizations that are concerned about natural resource and recreational opportunities (for example, the Ice Age Trail Association and Trout Unlimited can reach members who make use of facilities).
- 2) These are visitors who have reason for repeat visits (versus individuals coming out as spectators at youth sport events, who may come less frequently).
- 3) These visitors have reason to care about the retail, restaurant, and service mix of the community (as opposed to commuters, who must be enticed to stop).
- 4) The Chamber has long considered opportunities to market the community as a destination for natural resource recreation purposes.

The recreational visitors survey was distributed through various organizational listserves, including: Trout Unlimited, Black Earth Creek Watershed Association, Ice Age Trail Association, Friends of Festge Park, and Swamplovers.



## Findings - Residents

There were 585 respondents to the resident survey. Residents care a great deal about their community, as is evident through the high response rate and detailed comments provided in open-ended survey questions. **The summary below highlights key points from the residents survey.** We have presented graphs for those questions that lend toward a graphic presentation, and looked for common themes in the comments provided.

### 1. How would you rate the Cross Plains Retail Development Area (Main Street & Bourbon Road)? 0 = poor, 5 = great

Residents rated the Retail Development Area (Main Street & Bourbon Road) as low to medium for almost all variables. The mean score for these variables is listed below, **using a scale of 0 (poor) to 5 (great).** **The red star represents the attribute scored highest (best).**



### Key Points

- 1) Residents want a more diversified business mix that includes retail, restaurants, and services catering to the local population. Lack of parking is an issue for many.
- 2) There is currently residential apartment complexes in the middle of Main Street's two retail areas. The general sense is that there should be a halt to construction of housing in the retail development district. The focus should be on expanding retail.
- 3) Walkability and sense of safety are fairly high. Traffic on Hwy 14 (Main Street) can be imposing, and can form a threat to safety, particularly for pedestrian and bicycle traffic.
- 4) The preference is for businesses to retain historic flavor and small town charm. Preservation of older buildings is a priority.

## 2. How would you rate the Glaciers Edge Square retail development? 0 = poor, 5 = great

Residents rated the Glaciers Edge Square retail development as low to medium for most variables, with “sense of safety” and “walkability” rated highest. Attractiveness was rated the lowest. The mean score for these variables is listed below, **using a scale of 0 (poor) to 5 (great)**. The mean scores for the Glaciers Edge Square retail development were lower than for the Main Street Retail Development Area for all variables except business mix (which is still low). **The red star represents the attribute scored highest (best).**

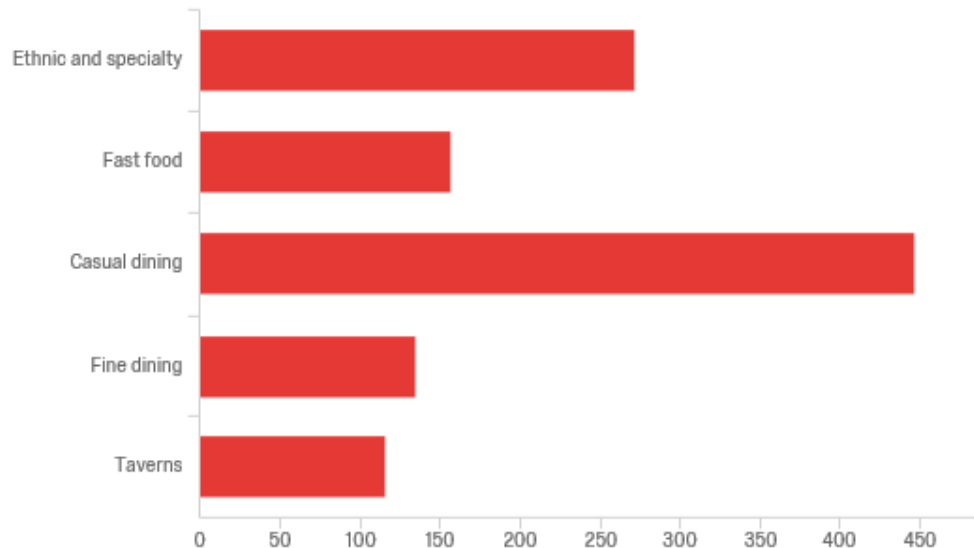


### Key Points

- 1) The lack of attractiveness of the Glaciers Edge Square retail is duly noted by residents. Attractiveness could be improved with consistent façades or with more consistency with the historic character of the Main Street retail area.
- 2) There is a greater business mix (compared to Main Street) that serves residents needs. Parking is appreciated.
- 3) It is important not to have vacancies at this retail center. The business development committee could assist with retention and recruitment.



#### 4. What two types of restaurants would you most like to see in Cross Plains?



The following comments are reflective of the predominant viewpoints:

- Desire for a place for younger people to hang out - ages 18-30
- Something different than bar and fast food
- Family friendly that is not just clean and tastes good but has some visual charm and appeal. It would also be nice to have something with a little more ambiance as well
- Affordable, consistently good, fun atmosphere
- Places to go with your family and enjoy without having to sit at a bar

Residents were consistent in their desire for more restaurants, with the exception of a few respondents who felt that there were sufficient restaurants to serve the current Cross Plains population. The responses received most regularly would point to community members strong desire to expand options for family-friendly restaurants with healthy food, a comfortable environment, at low cost.

Responses regarding preferred restaurant type fell into 6 main categories:

- (1) Family Casual Dining: Top of the list for desired style of restaurant is what can be considered family casual. This category included supper club, diners, home cooked foods. Responses ranged from general to specific, with a number of familiar family-style chain restaurants mentioned. Residents want a reasonably priced restaurant that is family/kid friendly, sit-down, has healthy options and comfort food/fish fry, and serves wine/beer but does not emphasize alcohol.
- (2) Ethnic: Equal to responses mentioning family casual dining was the prevalence of responses indicating desire for more ethnic cuisine in Cross Plains. Mexican food received the greatest number of requests. Several respondents indicated that they desired “authentic” Mexican food. Italian food was also top of the list, often times qualified to indicate preference for high end or casual establishments. While Indian, Thai, and healthy Chinese food were mentioned specifically, these suggestions were far surpassed in number by respondents specifically citing Mexican and Italian food.

- (3) Healthy, local food: Healthy food was mentioned quite frequently, whether in association with family-style restaurants, locally owned restaurants serving local food, or ethnic foods (several respondents indicated that they would like to see healthy Mexican, Italian, or Chinese food). Healthy food was often associated with locally sourced, organic, made from scratch, or grass fed.
- (4) Brew pubs with food: While some respondents indicated that Cross Plains already had enough drinking establishments (bars, taverns), there was a clear desire – similar in number of respondents as for healthy and local food - for brew pubs/microbreweries that serve food. Responses indicated that residents were looking for something distinctly different from old style taverns, with comments like “Cozy gastropub offering sandwiches, burgers & bites, plus drinks in warm surrounds with a patio,” or “Home style pub and casual food e.g. fish fry, hamburger/fries, blue plate specials,” or “a pub with indoor and outdoor environments that includes volleyball.” The family-friendly theme permeated this category as well.
- (5) Fast food/upscale fast food: Fast food was key for a number of residents, who even specified the brand of fast food establishment they preferred (Taco Bell, McDonalds topped the list for lower-end fast food; Panera, Chipotle, and Noodles topped the list for upscale fast food). Individuals requesting more fast food in Cross Plains typically mentioned several chains that they would like to see. However, relative to the number of respondents, fast food was not mentioned as frequently as were casual family and ethnic cuisine.
- (6) Fine Dining: While some local residents voiced interest in having fine dining offering unusual and outstanding food, as well as banquet opportunities for special occasions, the prevalence of this response was relatively low.

**5. Imagine the Retail Development Area (Main Street & Bourbon Road) of Cross Plains in 5 years. Rank the following statements to reflect your preference.**

Respondents were given a choice of 6 statements to rank. The following list indicates preferences from “most preferred” to “least preferred”:

- 1) The Retail Development Area has become an active meeting place and the center of community activities with a mix of retail, restaurant, and cultural venues.
- 2) The Retail Development Area includes stores and services that focus on resident’s needs.
- 3) The Retail Development Area has become a center for visitors utilizing recreational or cultural amenities.
- 4) The Retail Development Area has become a destination for people from outside of the Village.
- 5) The Retail Development Area has become a thriving center that focuses on a category.
- 6) The Retail Development Area looks much like it does in 2016.

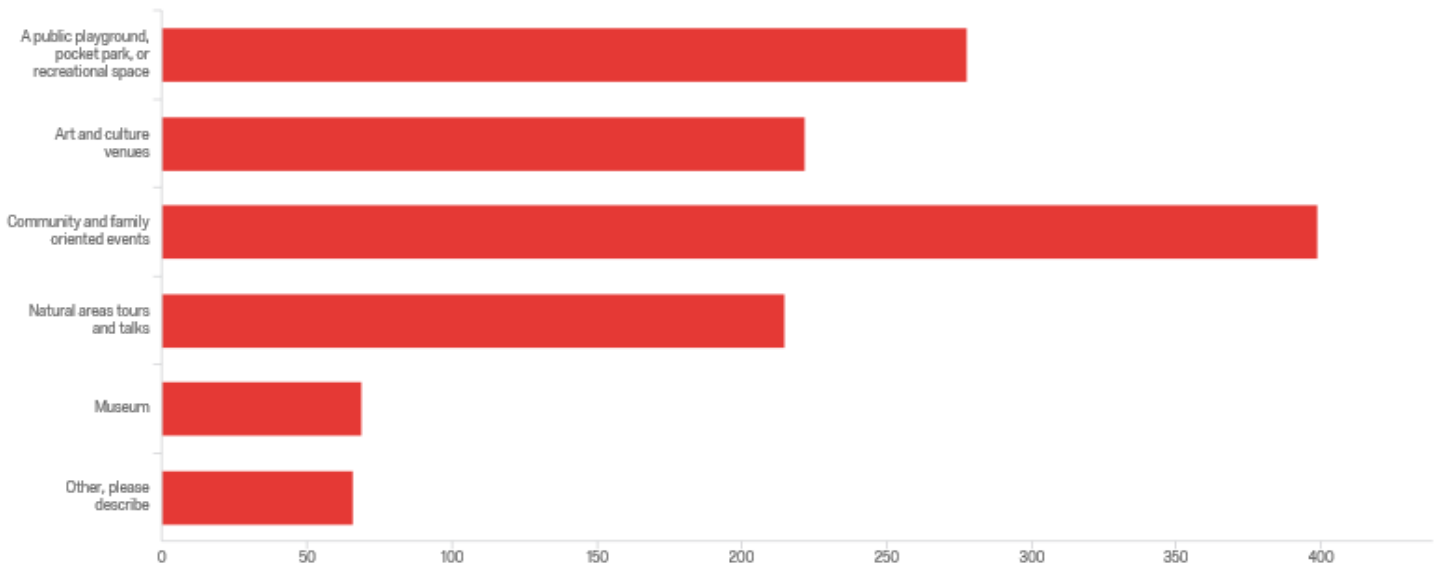
A follow-up question allowed respondents to describe their preferences for the Retail Development Area. Survey respondents, in providing greater detail, were fairly united on the following principles:

- Provide a variety of independent businesses that cater to resident’s needs
- Keep the small town charm of main street, with independent businesses, not chains
- Family-friendly entertainment as part of the mix
- Health and wellness services
- Attention to aesthetics and accessibility; orient businesses toward the creek, to take advantage of the natural beauty of the resources
- Preserve historic architecture and facades



## 6. What non-business facilities and activities would you like to see happening in the Retail Development Area?

When asked about non-business facilities and activities that residents desired to see in the Retail Development Area, two items took priority: community- and family-oriented events, and a public playground, pocket park, or recreational space. These were followed by arts and culture venues and natural areas tours and talks. Several items rose to higher prominence: a recreation center/senior center (including fitness center and splash park); family-friendly events (farmers market, arts fairs, music in the park); upgrades to Zander Park; a dog park; a museum or historical society; and a hotel. In summary, residents want the downtown to be a vibrant, community-centered place that focuses on family and bringing people together for a variety of activities.



## 7. What can be done to improve the walkability and pedestrian friendliness of access points (e.g., trails, the creek, bike path) to amenities in town?

In order to enhance resident and visitor experience, the Business Development Committee has suggested that improving access between natural resource sites and downtown businesses could drive foot traffic to businesses. Survey respondents suggested the following structural enhancements:

- 1) Improve the Market Street Bridge to include pedestrian crossing.
- 2) Increase the visibility of trail access through signage and improved trailheads.
- 3) Link trails to a regional trail system and market as such.
- 4) Improve parking and lighting.
- 5) Add sidewalks and bike lanes.
- 6) Address safety on Hwy 14 for pedestrians and bike traffic; slowing traffic; adding a footbridge; provide a safe school crossing.
- 7) Connect neighborhoods through bike trails.

## 8. What are your ideas for marketing Cross Plains as a destination for retail, recreation, and family-oriented activities?

The community has many assets and resources that attract residents and visitors. There are also multiple areas for improvement: building a more cohesive infrastructure for the business community; improving the attractiveness of Main Street; assuring accessibility of parking. There are also ways to build community recognition, such as through events that make Cross Plains a destination for people living in the trade area. Family events build internal community connectedness while external community events bring attention to Cross Plains internally and externally (examples of events include live music, business community events, candlelight hikes, dark sky events, star-gazing, taste of Cross Plains, seasonal farming events, and park events). The community needs to come to an agreement on branding – what is unique about Cross Plains? What makes it a great community to live in, work at, and visit? There is some agreement about the centrality of nature, the outdoor recreation focus, and the wealth of natural resources in the region as a component of the brand and marketing strategy. Another component of the brand is the emphasis on family. Several respondents encouraged Cross Plains to find a niche (like other communities such as Mount Horeb, Lodi, Verona).

## 9. Where do you shop (for select items), and why do you shop where you do?

Survey respondents were asked where they shopped for a range of market categories. Categories included: a) building materials and garden; b) drug and personal care; c) general merchandise; d) furniture and home furnishing; e) electronics and appliances, f) food and beverage stores, g) other retail (e.g., gift, hobby, music, antique); restaurants; personal services (e.g., hair care, fitness); professional services (e.g., real estate, banks, tax firms). For almost every category – with the exception of drug and personal care items, residents of Cross Plains shop predominantly in Madison or Middleton. For drug and personal care items, 74% of survey respondents indicated that they do the majority of their shopping in Cross Plains. 43% of respondents also indicated that they shop for food and beverage items predominantly in Cross Plains. For other categories, residents leave town. The reasons are fairly consistent:

- There are no stores in Cross Plains for the category
- Variety: there are better choices of product or services elsewhere
- Convenience (e.g., if respondent works in Middleton or Madison)
- Price
- Quality (of goods and services)

The predominant reasons given for choice of shopping venue were availability, convenience, and price.

**Summary: Recommendations from the Residents Survey:**

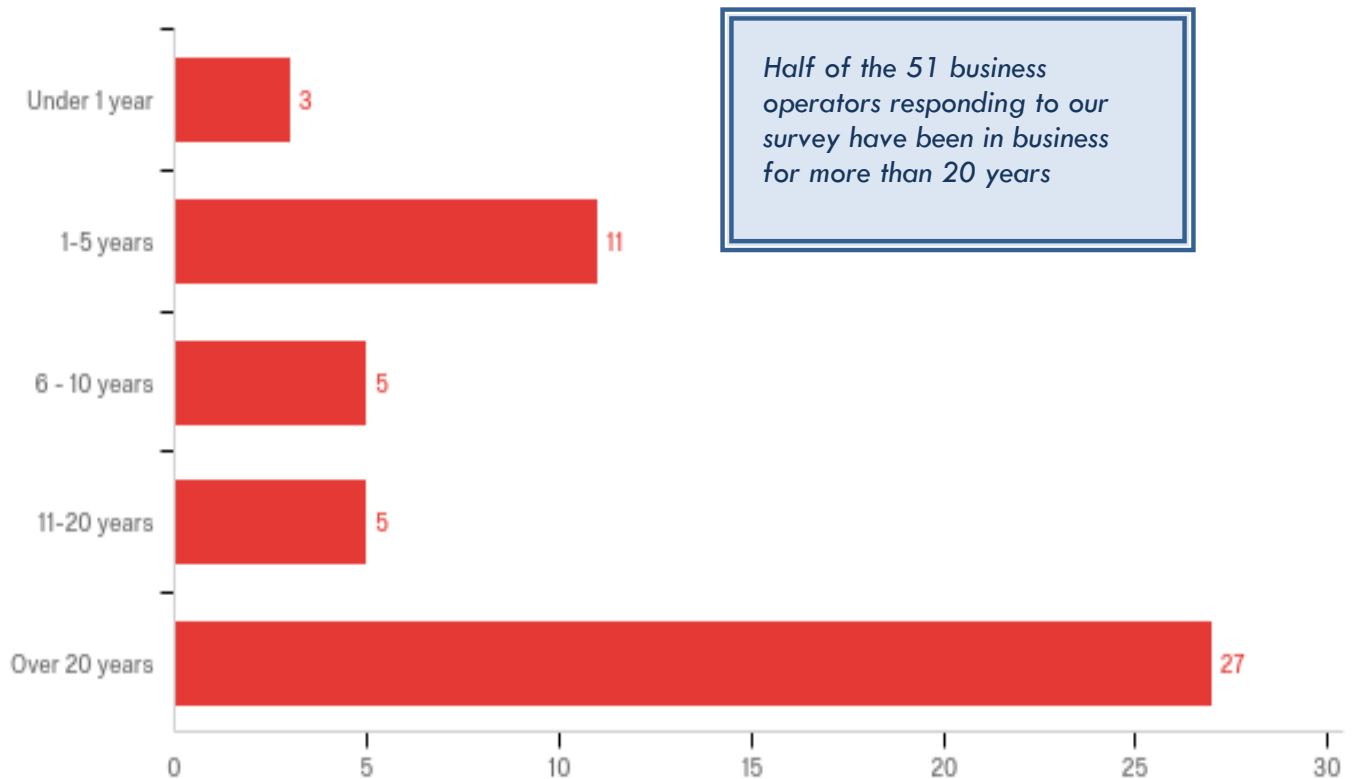
- 1) Re-brand Cross Plains as a family-friendly community-focused on recreation & the outdoors.
  - a. Increase the connectivity of trails, infrastructure, and parking
  - b. Support the Village Parks and Recreation Department's plan for continued development in Zander Park, and help promote it to the public
  - c. Increase usage of trail maps, wayfinding signage, business maps
  - d. Market the community to emphasize recreation and natural resources
- 2) Collaborate with environmental and civic organizations (Ice Age Trail, Swamplovers, Trout Unlimited, etc.), the business community, and the Village leadership to accomplish branding, trail access improvements, and bringing visitors to the community.
- 3) Main street retail area should be developed into an active Village center, with emphasis on:
  - a. Establishing a diverse business mix that caters to the needs of residents
  - b. Retaining or recreating an atmosphere that reflects the historic character and small-town charm of the community
  - c. Advocate for retail business versus residential development in the Retail Development Area
  - d. Take into account resident preferences for business development, as indicated by the survey results
- 4) Events are essential for marketing – seek co-sponsorship with organizations (including the environmental organizations listed above), civic associations, and businesses.
- 5) Promote branding and economic development through a collaborative engagement of the Village Board, the Chamber of Commerce, businesses, and residents.
- 6) Community residents have indicated that they want retail and restaurant development (for the most part) with a focus on retail that defines the community and serves residents. Public parking in the retail development district is essential to accomplish these objectives.
- 7) Glaciers Edge Square:
  - a. Advocate for aesthetic improvements and full occupancy, using the survey results as evidence
  - b. Exterior design of Glaciers Edge Square should be consistent with Main St. retail
  - c. Support the implementation of the Glacier's Edge Square Redevelopment Plan

## Findings – Business Respondents

There were 51 respondents to the business owner survey. This survey provided information about existing businesses. Additional questions were similar to those in the resident survey, and focused on business owners desired vision for the retail area and recommendations for how to attract, retain, and grow businesses. For this shorter survey, key findings are included as text boxes next to the graphs, followed by analysis.

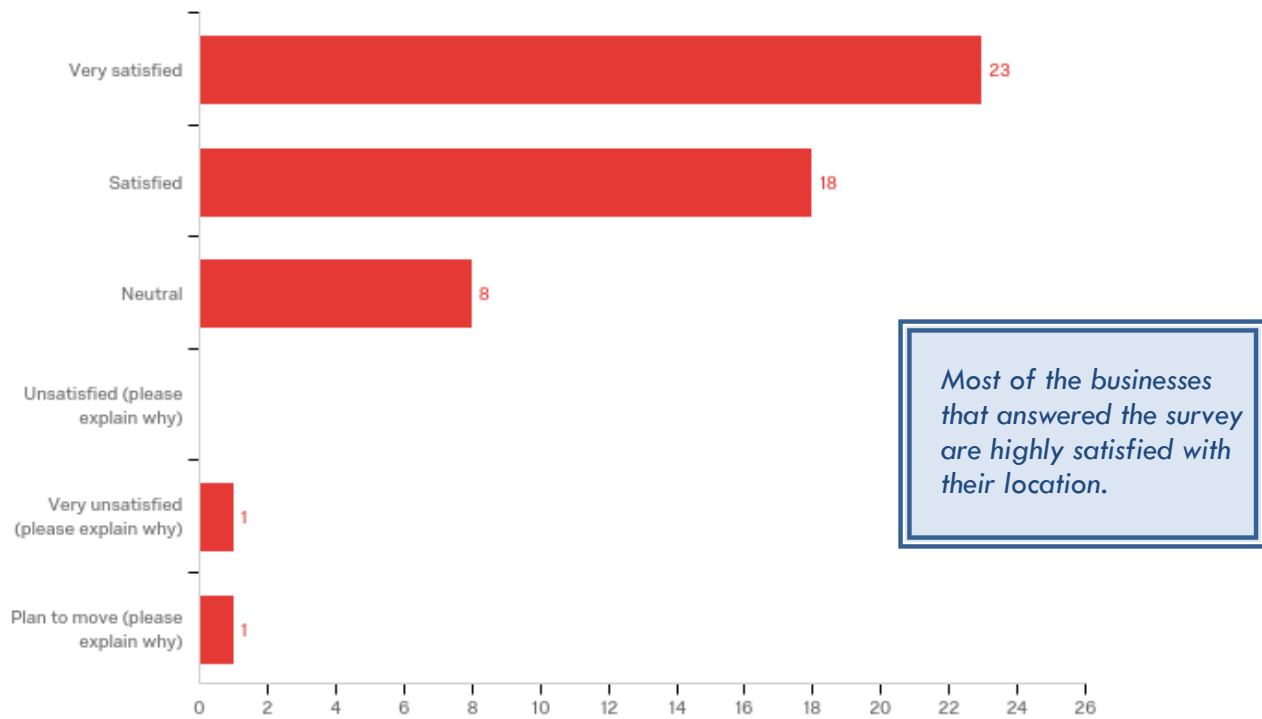
### 1. How long has your business been in operation?

#### Years of Operation



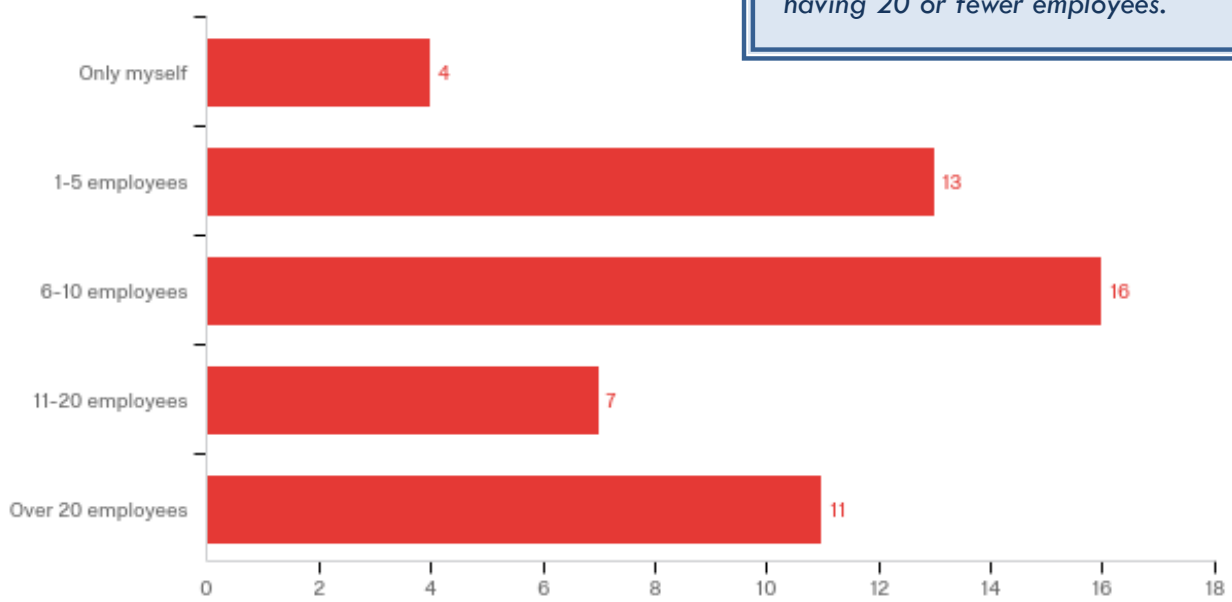
## 2. How satisfied are you with the present location of your business?

### Satisfaction with Location of Business



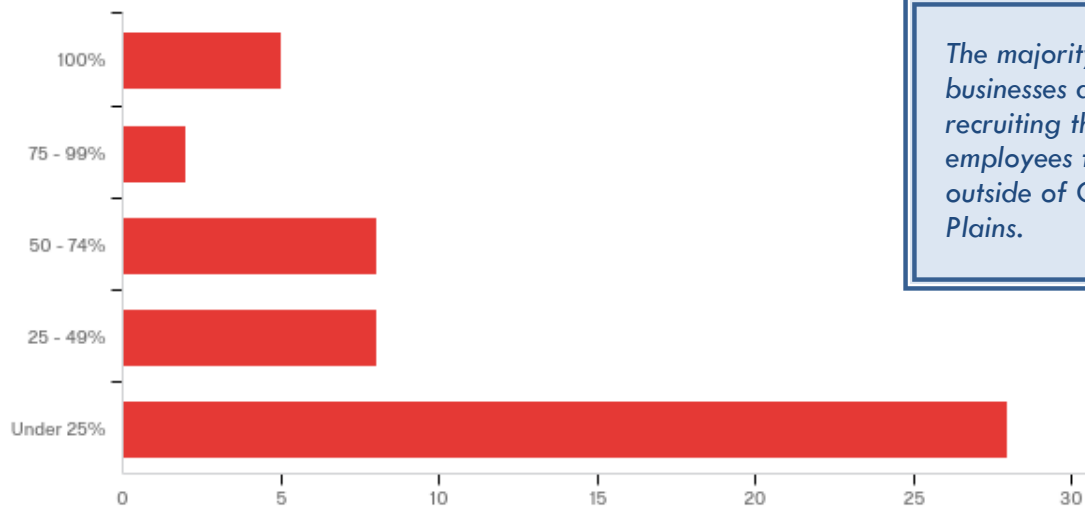
## 3. How many people does your business employ?

### Number of Employees by Business



#### 4. Approximately what percentage of your current work force resides in Cross Plains?

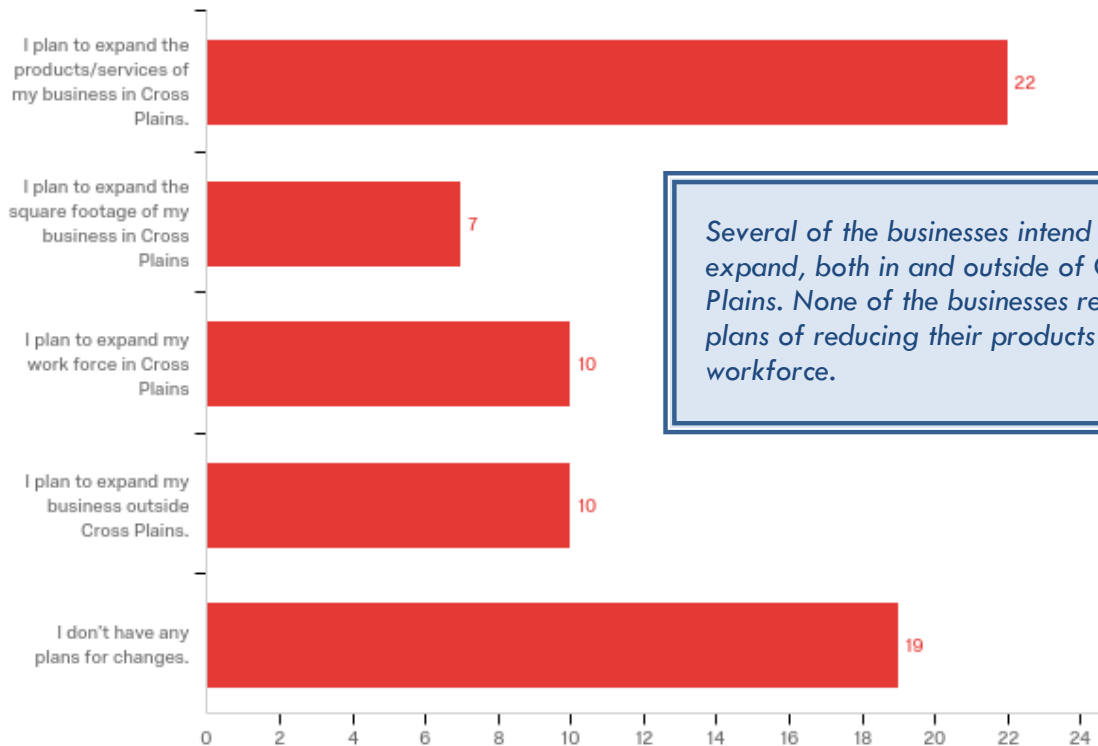
Workforce in Cross Plains



*The majority of businesses are recruiting their employees from outside of Cross Plains.*

#### 5. Do you have plans to expand or reduce operations for your business in the next 1-3 years?

Business Expansion/Reduction Plans

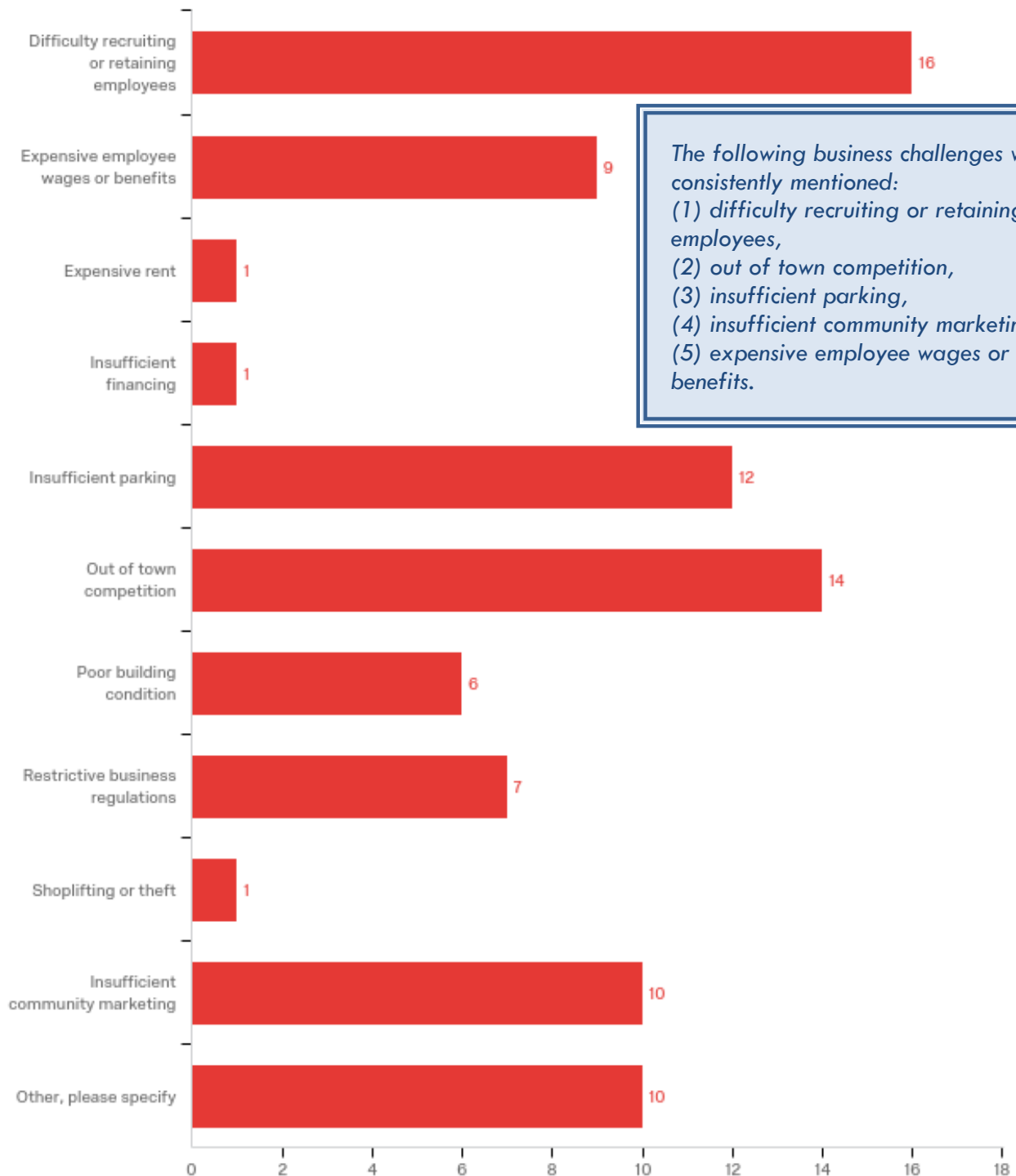


*Several of the businesses intend to expand, both in and outside of Cross Plains. None of the businesses reported plans of reducing their products or workforce.*



## 6. What are the top challenges facing your business?

### Top Challenges facing Business



## 7. What three existing businesses complement your business the most?

The responses most mentioned for this question included banks, physical therapy and health businesses, and restaurants. The answers varied, leading the Business Development Committee to conclude that complementary businesses were those most aligned with the business of the person filling out the survey.

## 8. Name the types of new businesses you would most like to see come to Cross Plains?

The answers to this question were of two types. The most prevalent answers were businesses that served needs of the people employed by the business, such as restaurants, hardware stores, shops, and services. These answers were similar to the answers provided by residents for a similar question. There was a second type of response that prioritized businesses that bring in employees and expand the business base (tech company, manufacturing facility, meeting facility, medical offices). As such, some of the business owners are looking for “more of any type of business development.” More business would mean more employees and hence more of a population to frequent retail, food, and service establishments.

## 9. Imagine the Retail Development Area (Main Street & Bourbon Road) of Cross Plains in 5 years. Rank the following statements to reflect your preference.

Respondents were given a choice of 6 statements to rank. Business respondents ranked the choices in exactly the same order as did the residents (with slightly different median scores). The following list indicates preferences from “most preferred” to “least preferred”:

1. The Retail Development Area has become an active meeting place and the center of community activities with a mix of retail, restaurant, and cultural venues.
2. The Retail Development Area includes stores and services that focus on residents needs.
3. The Retail Development Area has become a center for visitors utilizing recreational or cultural amenities.
4. The Retail Development Area has become a destination for people from outside of the Village.
5. The Retail Development Area has become a thriving center that focuses on a category.
6. The Retail Development Area looks much like it does in 2016.

A follow-up question allowed business respondents to describe their vision for business development in the Retail Development Area. Respondents were fairly united on the following principles:

- 1) Business respondents identified many characteristics of the community that would lend toward a **brand**. The characteristics include local, good retail, recreation, nature and outdoors, wellness.
- 2) Values that drive business development in the community include aesthetics, historic charm, vibrancy, sustainability, catering to a mix of clientele.
- 3) Cross Plains could become a destination; this will be best achieved with more public spaces, places to hang out, and diverse mix of restaurants and retail stores.
- 4) Any growth has to be accompanied by sufficient public parking.
- 5) Many respondents expressed a desire to have a strong mix of retail and restaurants on Main Street, and to stop building apartments in the midst of it.
- 6) A local retail mix is preferred, rather than chain stores. The business community could promote patronage of local businesses.
- 7) In order to provide customers for retail and restaurant businesses, it is important to have business development that brings in employees to the area.

**10. What selling points about Cross Plains would interest new businesses?**

- 1) Cross Plains is a growing community, and the population tends to be higher income.
- 2) There is a wealth of natural resources, beautiful surroundings, and opportunities for recreation.
- 3) There are a large number of commuters who go through town.
- 4) The community has a small town feel (while it is proximate to Madison, which is a benefit, it is not Madison and the small town feel should be promoted).
- 5) Real estate/rent is cheaper than in Madison or Middleton, and there are available places to grow a business.
- 6) Because of the location in proximity to Madison, there is excellent access to technology, internet services, and University expertise.
- 7) Cross Plains has great schools, and people move to the community in order to take advantage of these schools.

**11. What can the Chamber and the Village Board do to foster business development in Cross Plains?**

- 1) Develop a thriving downtown retail area by adding new businesses that might compete with existing businesses.
- 2) Market the community regionally and feed into the niche market of outdoor enthusiasts.
- 3) Promote businesses with shop local campaigns and awareness of how small businesses benefit the community.
- 4) Seek out and recruit businesses that follow the core values of the community, such as respect for the natural environment.
- 5) Request that the maintenance and appearance of Glacier's Edge Square be improved.
- 6) Develop a business park for small businesses to start and grow.
- 7) Establish a business park for creation of jobs, and expand affordable residential housing for the workforce.
- 8) Identify brand and mission, and then promote regional marketing, to bring people to the larger geographic area.
- 9) Develop a separate economic development organization that can focus on business recruitment and funding.
- 10) Improve communications amongst planning entities, especially between the Chamber of Commerce (representing area businesses) and the Village Board.

**Summary: Recommendations from the Business Survey:**

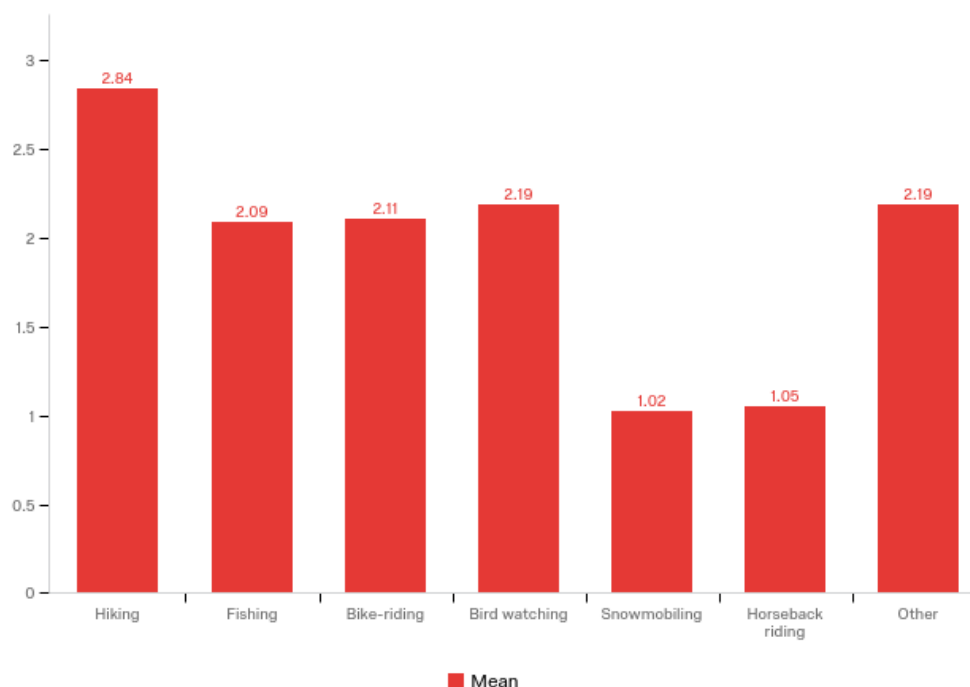
- 1) Expand the role of the Chamber of Commerce in:
  - a) Communications: enhancing the communication between the Village Board and the Chamber of Commerce around business recruitment, expansion, and retention
  - b) Branding: work with the Village board to define a brand that identifies what is distinct about Cross Plains in contrast to other communities
  - c) Vision Development: define the vision for business development that provides guidelines for the future
  - d) Marketing: Help all businesses through joint-effort community marketing. While marketing tools are available to businesses that are members of the Chamber of Commerce, many businesses are not currently making use of this resource. The Chamber can promote use of existing marketing tools.
- 2) The Chamber of Commerce should consider partnering arrangement and expanding staffing in order to increase capacity.
  - a) Partnerships between the Chamber and workforce development organizations and larger businesses can address how to effectively recruit employees
  - b) Partnerships between the Chamber and those businesses that are anticipating expansion can work to identify and address issues of location, space, employee recruitment, and marketing
  - c) Chamber staffing expansion and/or development of an Economic Development Corporation would increase capacity to support business expansion and recruitment.
- 3) Focus on business attraction, retention, and expansion in order to create a better business mix and a thriving development area. Efforts should highlight assets including our historic & small town charm, desirable school district, and proximity to Madison, Dane County Airport, and the University of Wisconsin.
- 4) Collaboration: There is opportunity to encourage business retention, expansion, and recruitment by enhancing collaboration among existing entities, and by adding an entity to focus on business recruitment (such as an Economic Development Corporation or Commission).
- 5) Recruit large employer businesses (and workers) to increase day-time frequenting of restaurants, retail, and service businesses in the Retail Development Area.
  - a) New workers, residents, and visitors will increase demand to support existing and new establishments
  - b) A large employer includes research- and product-oriented businesses, electronics, or manufacturing, and can be located in a business park
  - c) Work with the Village to provide sufficient parking

## Findings – Recreational Visitors

The recreational visitor survey was distributed via the listserves of various environmental organizations, including: Ice Age Trail Alliance, Trout Unlimited, Swamplovers. Altogether, there were 165 respondents to the survey. This survey provided information regarding people who come to Cross Plains for various recreational activities, and what they expect when they come into town. Respondent characteristics are consistent with the known characteristics of recreational visitors to the area: They are predominantly 46 years of age or older, and from two-person households. Upwards of 60% of respondents were male.

### Visitor Characteristics:

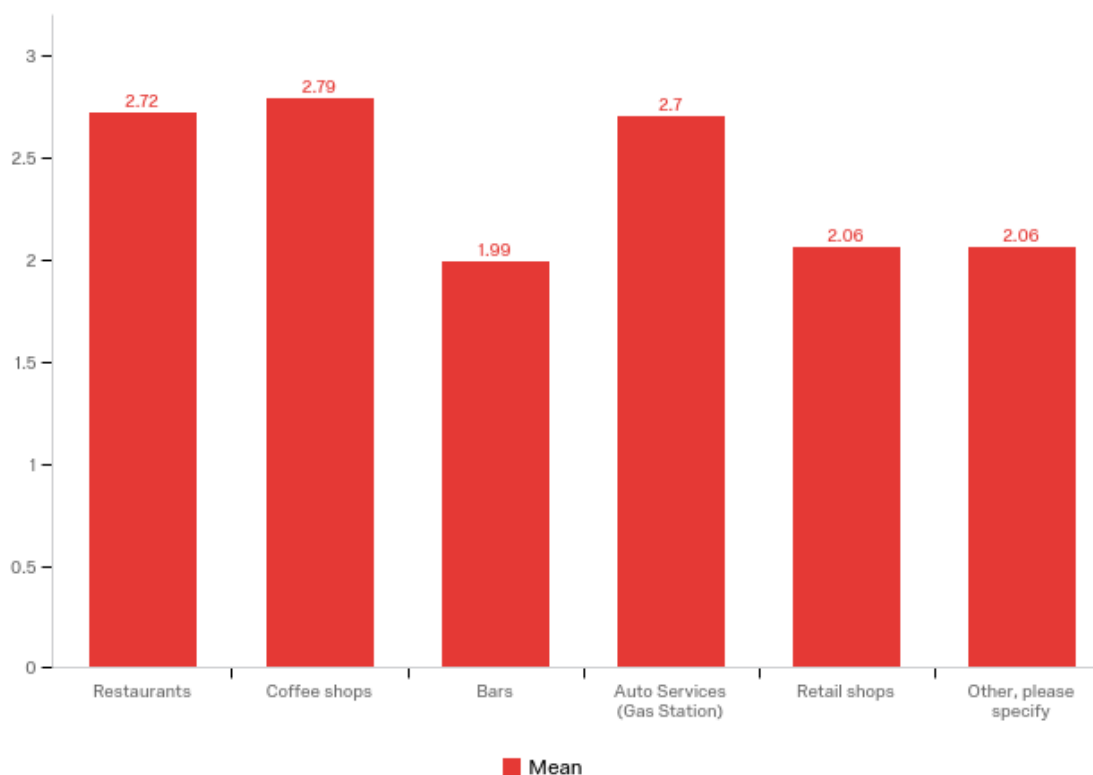
Recreational Activities of Survey Respondents



**1. What recreational activities do you do in the Cross Plains area, and to what frequency?** The mean score tabulates the frequency with which these activities occur across all respondents. The highest response was for hiking. This is not surprising, given that the Ice Age Trail Alliance was very good at getting the word out to their members about this survey. Many trail walkers are also bird watchers. There are other recreational visitors to Cross Plains who were not captured with this survey tool. For example, there are recreational and school-sponsored sport team events in Cross Plains, but there isn't a clear way to capture responses from this user group.

## 2. When visiting the Cross Plains area for recreational activities, which of the following establishments do you visit, and to what frequency?

Businesses frequented by Survey Respondents



Most of the recreational activities mentioned by respondents are daytime activities, hence it is not too surprising that coffee shops and restaurants receive greater patronage by these visitors than do bars. Not captured in survey responses, but anecdotally related by study team participants, is that often times fly fishermen are just that – men. They have noted that their wives would appreciate better retail options in Cross Plains, or other alternative activities.



**3. How would you rate the retail district (Main Street and Bourbon Road)?** 0=poor, 5=great. The dashboard indicates the mean response.

#### Visitor perception of Retail District



#### Key Points:

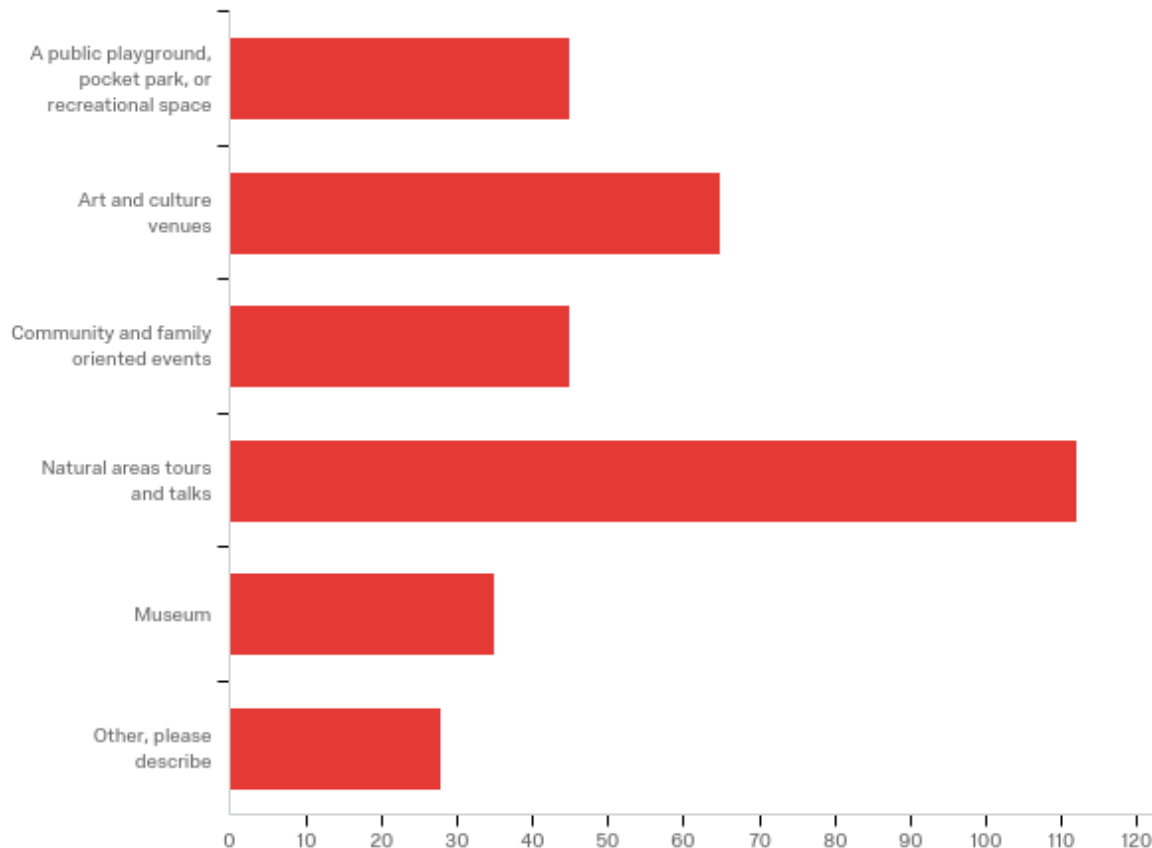
- 1) Visitors rated the retail area higher on all variables than did resident or business respondents.
- 2) Visitors are in the habit of going to the coffeehouse or restaurants.





## 6. What non-business facilities and activities would encourage you to visit Cross Plains more often?

### Non-business activities desired



#### Key Points:

- 1) Visitors are most interested in tours and talks about natural areas, followed by arts and culture venues.
- 2) Respondents recommended that the community expand recreational opportunities (fishing access, cross country ski trails, dog park, bike routes, hiking on Ice Age trails) and access to recreational areas.
- 3) Respondents were concerned with protecting and enhancing recreational amenities.

## 7. What can be done to improve the walkability and pedestrian friendliness of access points (trail heads, the creek, the future bike path) to amenities in town?

#### Key Points:

- 1) Parking is a key concern. There is a desire for defined parking areas for the natural areas. Taking away street parking limits visitor parking options.
- 2) Access to toilets is important and could provide an improvement in the visitor experience.

- 3) Improved signage – with maps – would be helpful. If visitors don't already know the location of trailheads, they have a hard time finding them.
- 4) Improved signage can provide historic information to draw people in to the history and geography of the area.
- 5) Increase access from the south side of Cross Plains to the North (Retail Development Area). It is difficult to get across the highway KP bridge and railroad tracks from Main Street to Bourbon Road. Several areas would benefit from better walking access. Improved access for trail crossing is scheduled for 2018.
- 6) Visitors recommend making the community more bike-friendly, specifically by extending the bike path from Wisconsin Heights School to Cross Plains and Middleton.

## **8. How could Cross Plains better accommodate your experience as a visitor to the community?**

### **Key Points:**

- 1) A strong sentiment for many of the visitors is that Black Earth Creek must be protected above all. The creek is an asset that brings people to town for trout fishing (cold, clean water makes this a class A creek). Any development that raises water temperature would be detrimental (e.g., due to sedimentation from erosion or run-off from construction). Business development **MUST** be in line with conservation and protection of natural resources.
- 2) Increase connectivity of hiking trails (e.g., Table Bluff and Hickory Hill trails) and bike paths.
- 3) More hiking trails, and paths/corridors to link trails would bring in more hikers.
- 4) Make more off-street parking available.
- 5) Better (wider) bicycle routes leading into the Village, and/or off road bike trail from Middleton.
- 6) Access to public bathrooms is important for recreational visitors.
- 7) Increase retail and dining opportunities to draw visitors into the Retail Development Area.

**Summary: Recommendations based on responses to the Visitors Survey:**

Recreational and natural resource visitors to Cross Plains are key to the economic sustainability of the business community and enhance the vibrancy of the Village. Respondents to the survey represent one very important slice of visitors and they have a very specific interest in the conservation and sustainability of the region. To appeal to these visitors, any development must do the following:

- 1) Enhance rather than detract from the health of the resources. This is true, in particular, with respect to Black Earth Creek.
- 2) Emphasize the unique resources of the area, including the Black Earth Creek, the Ice Age Trail, prairies, swamps, Zander Park, and conservancy land.
- 3) Increase educational and interpretive activities on recreational lands to extend visitor activities.
- 4) Build awareness of natural resource amenities, recreational activities, and events through effective marketing.
- 5) Increase family biking opportunities throughout the corridor from Madison/Middleton to Cross Plains/Black Earth/Mazomanie (bike path development).
- 6) Maintain the small town feel of the retail area, while increasing retail and dining opportunities that draw in recreational visitors.
- 7) Increase parking along the Retail Development Area.
- 8) Improve signage for connecting trailheads with the Retail Development Area.
- 9) Enhance visitor experience through the availability of public restrooms.
- 4) There is opportunity for the community to partner with non-profit and civic organizations that focus on environment/natural resources to provide events of interest to recreational visitors.



## Synthesis of Survey Results: Main Lessons

*Given that there were three different surveys administered (residents, business owners, and visitors), it is important to note the similarities and differences identified amongst these three populations. We feel that the comments of respondents reflect consistent values for the community, as outlined below.*

### Values

The study team identified the following values from the survey results:

- Sustainability
- Conservation/stewardship of natural resources
- Green space & recreation
- Family
- Community
- Growth (people, homes, business)
- Equity – providing affordable housing
- Wellness
- Aesthetics
- Access
- Historic flavor
- Support local

There were a number of identifiable differences amongst these survey respondents as well. These can be summarized as follows:

- 1) Residents emphasized business development that primarily serves community residents and builds a sense of community cohesion. Residents identified a retail and restaurant mix that allow residents to shop locally and expand restaurant and service opportunities. Residents also identified the importance of incorporating playgrounds and family gathering spaces within the Retail Development Area.
- 2) Business owners indicated that they see the need to bring more workers into the community during weekday and business hours, in order to support the local retail and service businesses that are currently operating. Business owners suggested that recruiting a large employer would be a big boost to existing entities.
- 3) Recreational visitors expressed strong sentiments that business and retail development could not be at the expense of the local environment. Often times construction (due to development) adversely affects stream quality because it leads to erosion, sedimentation, and, consequently restricted stream flow and warming of the water in the Black Earth Creek, a world-class trout stream. These visitors indicated that protection of natural resources was their highest priority, and that business development must be consistent with this value.

## Key Business Development Areas to address

The Business Development Committee identified the following areas to address based on survey analysis.

- 1) Values & Branding: determine Cross Plains' unique identity and market that.
- 2) Marketing & Promotion:
  - a) Emphasize what is unique about the area and the community: natural resource bounty, the railroad, history, small-town charm.
  - b) Events: collaborating with businesses, the Village, and organizations to expand offerings.
- 3) Business Development & Retention
  - a) Identify core businesses that meet the values of the community, recruit, and support them.
  - b) Encourage entrepreneurship to develop retail, service and restaurant businesses that cater to residents and visitors alike.
  - c) Embark on shop local campaigns and community marketing to assist businesses, support new growth and expansion.
- 4) Business Development Planning
  - a) Prioritize businesses that meet the needs of residents.
  - b) Cross Plains is in competition with other communities for businesses
    - i) Create a favorable business environment in Cross Plains for those businesses that fit the values of the community.
    - ii) Community (Chamber plus Village) can support business attraction by assuring that there is labor, real estate, and parking.
    - iii) The Chamber should be regarded as clearly adding value by doing marketing and promotion on behalf of businesses.
- 5) Workforce Development
  - a) Consider recruiting large employers to expand the workforce numbers frequenting the retail and restaurant businesses in town.
  - b) Explore workforce training to meet the needs of new industry/business and support existing businesses.
- 6) Infrastructure Development
  - a) Assure that infrastructure is developed to support business expansion and recruitment efforts.
    - i) Parking
    - ii) Signage
    - iii) Access to parks and natural areas
  - b) Support the maintenance and upkeep of existing businesses.
- 7) Coordinated Communications
  - a) Maintaining communication and collaboration between the Chamber of Commerce, the Village Board, and the Village Administration is essential for moving forward.
  - b) Planning and development (Village) work needs to be in sync with business development work (Chamber of Commerce).

## SECTION 6: COMPARISON COMMUNITY ANALYSIS

*As a community considers business development strategies, it is helpful to examine the downtown Study Areas of comparable communities that have similar characteristics. This comparison shows what kinds of retail/restaurant are supported in similar places. The evaluation also identifies real-life examples of downtown study areas that have defined their niche with a clear position in their market in terms of goods and services offered, as well as primary consumer segments served.*

### Comparison Community Selection

Comparison communities were chosen based on their population, distance from Madison, and market segments served. Most importantly, the communities chosen had to have an active and well-recognized downtown core. For this analysis, the following communities were chosen:

- Mount Horeb
- Lake Mills
- Cambridge

The study team visited each community for a walking/observation tour, conversations with local business operators, and organized interviews with Economic Development personnel.

### Business Mix of Comparison Communities

The following exhibit displays the number of businesses, and their square footage in the Cross Plains Study Area as well as the three comparison communities.

**Exhibit 6.1: Current 2017 Retail and Restaurant Mix in Comparison Communities**

NAICS Code	NAICS Description	Cross Plains Study Area	Sq. Footage Total - CP	Mt. Horeb	Sq. Footage Total - MH	Lake Mills	Sq. Footage Total - LM	Cambridge	Sq. Footage Total - C
442	Furniture and home furnishings stores	-	-	1	2,000	3	4,250	1	2,000
443	Electronics and appliance stores	-	-	-	-	-	-	-	-
444 Adj.	Building material and garden w/o Home Ctr	2	13,000	-	-	1	1,500	-	-
445 Adj.	Food and beverage stores	2	32,000	-	-	1	15,000	1	1,000
446	Health and personal care stores	3	19,000	1	3,000	1	2,000	1	2,000
447	Convenience Stores in Gas stations (excluding gas)	1	7,000	-	-	1	3,000	-	-
448	Clothing and clothing accessories stores	-	-	2	7,200	1	2,000	3	4,000
451	Sporting goods, hobby, musical, and book stores	1	4,000	1	1,000	-	-	2	1,250
452 Adj.	Gen Merch. w/o warehouse and supercenters	1	13,000	-	-	-	-	-	-
453	Miscellaneous store retailers	-	-	14	18,250	3	15,000	5	6,900
7224	Drinking places (alcoholic beverages)	1	1,000	2	2,000	2	2,500	1	2,000
722511	Full-service restaurants	3	8,000	2	6,500	6	13,000	2	9,000
722513	Limited-service restaurants	3	7,000	4	3,750	2	2,000	2	1,250
722515	Snack and nonalcoholic beverage bars	1	1,000	1	250	-	-	-	-
	<b>Total Retail and Restaurants</b>	<b>18</b>	<b>105,000</b>	<b>28</b>	<b>43,950</b>	<b>21</b>	<b>60,250</b>	<b>18</b>	<b>29,400</b>

The exhibit indicates that Cross Plains has fewer retail and restaurant businesses than Mount Horeb and Lake Mills but the same as Cambridge. However, the amount of retail space in Cross Plains is significantly higher than the comparison communities due in part to a large grocery store, implement dealership, and lumberyard, which inflate the square feet of space.

## Mount Horeb Community Visit

Mount Horeb was chosen as one of the comparable communities to visit, despite a large difference in population size (7,242 total population for Mount Horeb in 2016, in contrast to 3,758 people in Cross Plains). Mount Horeb is regarded as a community with a brand, a good visitor base, a vibrant business mix, and, in recent years, an expanding business base. The study team wanted to learn from the successes of this community. The study team first walked through the downtown with the intent of collecting impressions based on visual aspects of the main street. Some study group members were also able to hold conversations with business owners. The community walk-through was supplemented with a planned question-and-answer session with members of the Mount Horeb Chamber of Commerce (Melissa Theisen, Chamber ED) and Economic Development Corporation (Brad Murphy, ED; Mary Grundahl, incoming ED). The comments from both sources of information are summarized below.



**Planning for Business and Economic Development:** Previously, the Chamber and the Village had economic development committees, but these committees were not achieving traction at attracting new businesses. A third entity – the Economic Development Corporation (EDC) – was formed in 2015 as a non-competing, non-profit organization, with the role of business attraction and recruitment. The EDC engaged the community in determining the highest priorities business development. They focused their energy on a few key priorities, and had an early success with the recruitment of a hotel operator, and the creation of a new TIF district and recruit new businesses.

The EDC learned some key lessons early on:

- Engage the community in coming up with the vision – you can leverage this planning work in recruiting appropriate businesses.
- Pull current business owners into the visioning work: The EDC interviewed business owners to understand their needs and views on the business community. The EDC then engaged existing businesses as a “New Business Recruitment Committee.” This committee worked on a promotional video, with current business owners speaking about how they build their business, and creating a case for new businesses to locate in Mount Horeb. Organizing investors is difficult: the key is initial organizational effort and follow-through. There are businesses and individuals who have been in the community for a long time. If they see that you are there for their success, they will be supportive.
- Engage the media to highlight local businesses.

**Branding and Marketing:** The community of Mount Horeb is famous for its Norwegian heritage (evident in the visitor center décor, restaurants, and festival themes) and its “trollway.” The uniqueness of the Trolls, found throughout the Village center, adds appeal to the visitor experience.

**Attracting visitors and encouraging local spending:** The community works to bring local residents and visitors to the community for events and shopping. The Chamber of Commerce sponsors 4-5 annual events (Art Fair, Thirsty Troll Brew Fest, Fall Heritage Festival, Holiday Craft Festival, Retail Thank You Day). Other events are run by civic organizations or grass-roots groups (Frolic, Scandihoovian, Fat Tire, Groundhog Day at Cave of the Mounds). Outside of Chamber-sponsored events, there is little community

marketing done by the business development groups. Duluth Trading Company does a great deal of advertising that brings people into the community, from extensive use of billboards to advertising on a local silo. Of late, there is increased opportunity to attract recreational visitors into town, with the growth of retail and restaurants in the business district, and because of the new GrandStay Hotel. Blue Mounds State Park attracts visitors from throughout the region, as do various natural resource amenities. The Chamber is considering marketing weekend-long events, such as fishing tournaments, bike events, or a themed event.

**Anchor businesses:** Duluth Trading Company is a key anchor business. There is also a History Museum, which is growing. The hotel is an asset to all the other businesses, as it allows visitors to stay overnight. There are several long-standing and well-known restaurants that attract visitors from out of town.

**Observations from the Cross Plains study team about the downtown area:**

- There is a coordinated charm to the store-fronts; each has its own identity, but they fit together. Historical homes repurposed for retail provide a unique character
- The Welcome Center is very prominent/visible. The building is owned by the visitor's bureau. The community did fund-raising so that this could be purchased. The Chamber, Historical Society, and visitors bureau share the space
- There is a good retail mix for a small community (resale, arts, specialty shops, antiques, restaurants, bars, coffee shops). Shops are open most weekends, but there are inconsistent store hours in the evenings
- The anchor business, Duluth Trading Company, is a growing business that has brought in a lot of employees. These employees frequent the restaurants, coffee shops, stores, and bars, and help recirculate money in the local community. Duluth Trading Company purchased the "Innovation Center" (Old Bank Building) with the original intent of sharing the space. They ended up needing the entire building
- The downtown retail area includes service businesses, including a barber shop, chiropractic, dentist, lawyer, telecommunications
- The downtown has unique, independent shops. Business owners are invested in the community
- Chain stores (including a grocery store) are located away from the downtown area. The industrial area is on the west side of town, with some industrial on the south edge
- There is a lot of street parking in the downtown area which encourages patronage of retail shops
- The general appearance of the street is clean and well cared for. Red brick accents in the crosswalks slows traffic and is visually appealing. Trash cans at intersections and tree plantings on the terrace indicate care for aesthetics
- Pocket parks are not located in the retail area; rather, they are found on the west side of downtown. Several of the events are held at the parks (Fireman's Park, Grundahl Park)
- The community has built the downtown area to be a draw for visitors. The community is branded as the "Troll Capital of the World" (emphasizing a unique niche) and many of the shops promote the Norwegian heritage of the region. The Visitors Center is very welcoming. The events bring visitors in for shopping and restaurant patronage
- New construction for business is by the highway. There is a lot of expansion space out of town for housing development (150 lots available)
- People in the community are very welcoming and polite. The streets are pedestrian-friendly. The EDC and business owners are boosters for their community

## Lake Mills Community Visit

Lake Mills has a larger population than Cross Plains (6,037 in 2016), and has a reputation of attracting out of town tourist visitation due to their natural resources (Rock Lake and the Drumlin Trail). The area has a draw for Chicago residents, hence restaurants and breweries/wineries are important. The Cross Plains study group anticipated similarities due to their intent of attracting out-of-town visitors. The study team talked with business owners Shawn & Rae of Water House Foods; Patrick Doyle (VP, Chamber of Commerce); Katie Otto (Main Street Program ED), and visited the Lewis Station Winery. Our tour of the retail area was cut short due to time limitations.



**Planning for Business and Economic Development:** There are three entities that address economic and business development: the Chamber of Commerce, the Main Street Program, and the Glacial Heritage Development Partnership. The Main Street Program plans events for the community, and assists with business development. Lake Mills regards itself as a bedroom community – it is halfway between Madison and Milwaukee – this can be both an asset and a difficulty. Visitors from Madison, Milwaukee, and Chicago support the community, but residents have multiple shopping options outside of Lake Mills.

**Brand/Market Niche:** “Legendary” Lake Mills inspires a sense of wonder and mystery. The community uses this sense of legendary to create a unique identity. The small-town feel of the community, and the historic buildings contribute to the sense of legend.

**Business Attraction and Retention:** There has been an ebb and flow of businesses, with a recent loss of some retail, but with growth in the winery and new service businesses (music teacher, dog training/grooming, CPA, other services). Selling points that attract businesses to the community include the business park, the excellent school system, and good recreational opportunities in the region. The Main Street Program is an additional asset, in that this program works to enhance existing businesses and attract new businesses. The MSP provides facade improvement grants to businesses. Challenges include attracting a diverse array of businesses. With anticipated road construction in summer 2017, there is a need to market the businesses and community to assure that existing businesses survive and thrive.

**Attracting visitors and encouraging local spending:** There are recreational opportunities that attract visitors, primarily from Chicago. Rock Lake is a key draw, as is the Glacial Drumlin bike trail, Rock River, and Aztalan State Park. The restaurants are very important for maintaining a visitor population – restaurants and bars are a sector with growth opportunity. With visitors come opportunity for restaurants and bars to thrive. There are several restaurants downtown that serve local food. Lake Mills is in the hub of an agricultural area and can readily get local product. The local population is not as interested in restaurants that serve local food, but out-of-town customers are aware of the seasonality of food products. The Chamber and the Main Street Program use events to attract residents and visitors alike. Events include the Knickerbocker Ice Festival, the Fall Fest, Arts events, and Town and Country Days. Events celebrate the history of the community. A summer farmer’s market, held in the park in the Village center, brings people into the retail district. The Arts Alliance of Lake Mills is developing a project to put statues up downtown as temporary art installments, which will bring intrigue and beauty to the downtown. The area has attracted artists, and emphasizing arts can build community recognition. Commuters are not a factor for Lake Mills, as the interstate is not proximate.

**Anchor Businesses:** The main anchor businesses are in the food and beverage sector. These include Tyraneana Brewery, Wisco Farm Coop (wholesale cheese), Crystal Farms (distribution service), James J.



Chocolates, Lewis Station Winery, and the Grist. Other major employers include Hamlin Electronics and Fiberdome.

**Observations from the Cross Plains study team about the downtown area:**

- The Village has an historic charm. Older buildings are used for retail stores.
- The retail district orients around the park, with two main retail streets along the park's edge. The park has large trees and a visual appeal. Garbage cans are available on street corners.
- The business mix is limited, with very little retail (and limited variety). There is some emphasis on antique stores and resale. Retail shops have limited evening hours. Weekend hours are available.
- Dining and drinking establishments are more prevalent, as are service businesses.
- The industrial part is outside of town.
- The streetscape was noticeably in need of repair (curbs crumbling, crosswalks faded) but this is scheduled.
- Area businesses are involved in advertising events.
- The Rock Lake and beaches attract visitors, but these need to be connected to the town center.

## Cambridge Community Visit

In some ways, the Village of Cambridge holds more similarities with Cross Plains than either of the other communities. Although smaller in population (1,482 residents in 2016, contrasted to 3,386 in Cross Plains), the area thrives on its recreational amenities, and has more square footage for retail shopping than Cross Plains. The Cross Plains study team met with Linda Begley-Korth (Village Economic Development Director), Sheila Palinkas (Chamber Board), and Bev Semmann (owner of Rowe Pottery).



### Planning for Business and Economic Development:

The Chamber of Commerce, the Village Economic Development Corporation, and the Village board all work together on economic development. They sit on each others' boards to facilitate communication. The three entities collaborate for an annual community visioning meeting, which draws upwards of 100 people. The visioning generates many possible ideas; the challenge for the community is how to implement these.

**Brand/Market Niche:** The Chamber of Commerce recently did a rebranding project. After extensive conversation, they decided to keep the umbrella logo, which symbolizes that everything – people, community, business – is encompassed under it. With the goal of being a destination community, the branding strives to communicate that there are a broad range of activities that visitors can do in the community. “Cambridge: do a day of Play” puts activities under categories: activity, romantic, shopping, family, artful, and foodie. The Chamber website has been re-designed to reflect this brand and marketing strategy.

**Business Attraction and Retention:** The branding and marketing work helped make the business community aware of assets and gaps within the market. To fill the gaps, the Economic Development Director works to find what businesses might be able to locate or grow in the community and to match people with resources. A small group of people have started meeting to determine what the community wants in their town, and to recruit people to invest in business development in the community. The Chamber has conducted surveys of residents to determine what businesses are desired and what residents are willing to pay. The town works to build business relationships by holding monthly networking events on economic and business development.

**Attracting visitors and encouraging local spending:** The branding serves as a frame for marketing the community. Building on the tag line “How do you want to play today?” the Chamber sponsors events that get people out to enjoy the community and to support local businesses.

- Shopping locally: The Village also holds events to encourage residents to shop locally. Events cater to different demographics. “Girls Night Out” is a big event where local businesses stay open at night, offer specials and gift bags; the event ends with an after-party raffle.
- Attracting recreational visitors: Natural areas attractions include Lake Ripley and CamRock Park (beautiful beaches, bike trails, single-track trails). There is a walkway to connect the park and trails to town. There are nearby vineyards, and the Village is hoping to create a bike trail that would go to the vineyard and distillery. Marketing is needed to encourage visitors to the park and lake to come into town.

- **Arts Focus:** Rowe Pottery has been in town for decades and there is an arts scene in the region. The Arts Council sponsors the Midwest Fire Festival, has great success in attracting people to the community for arts, music, and food.
- **Developing lodging potential:** There are Bed and Breakfast lodging and small motels available in the area. There is a Holiday Inn Express in Fort Atkinson (the nearest national brand hotel). They are now looking for investors to establish a small, boutique-style hotel (individual contact). Engagement, for example, watching pottery being made. They are trying to make connections between businesses (e.g., pottery & whiskey).
- **Commuters:** With 8,000-10,000 people driving through the Village each day, there is great opportunity to expand the base of people who shop in town. The EDC and Chamber want to use public art sculptures to encourage people to stop, and in the future hope to take advantage of grants to fill empty storefronts with pop-up exhibits.

**Anchor Businesses:** Rowe Pottery is the primary anchor businesses. Specialty stores – including jewelry, clothing boutiques, a wedding store, and a florist – make up a fair segment of the retail mix.

**Observations from the Cross Plains study team about the downtown area:**

- There are a large number of vacant store-fronts (estimated 30%) in the main retail block. Some of these are un-kept and detract from the look of the community. There is not a consistent façade look.
- There is no consistent look to the community; two new complexes feature a variety of co-located retail enterprises.
- The retail mix is varied, with several unique boutique stores. Retail is complemented with restaurants, service businesses (attorneys, insurance, realtors, furniture store, bridal shop) and a Matt Kenseth Museum.
- Many of the stores have varied hours and limited evening hours.
- There is adequate street side and public parking.
- Although visitors come to town for Rowe Pottery, restaurants, and for the festivals, there was no visitor center in evidence. There is opportunity to better connect the Village center to the Glacial Drumlin bike trail, CamRock Park, Lake Ripley, the Vineyard, winery and distillery.

## Key Findings from all Three Community Visits

- 1) Having an anchor business, such as Duluth Trading Company in Mount Horeb, contributes significantly to the customer volume coming into town, and therefore benefits retail and restaurant businesses.
- 2) A designated economic development organization, partnering with the Chamber of Commerce and local government, leads to better implementation of goals.
- 3) The physical look of the community environment (streetscape, preservation of historic buildings, store facades, parks and plantings, garbage containers) has a direct impact on the attraction to the community.
- 4) Coffee shops tend to serve as great gathering places for rural communities, and proprietors of coffee shops tend to be community organizers, utilizing social media effectively to build connections within the community.

## SECTION 7: ANALYSIS OF RETAIL AND RESTAURANT DEMAND AND SUPPLY

*This section provides a quantitative approach to estimating demand for 14 general categories of retail and restaurants. Recommendations from this analysis will be reflected in the market opportunities.*

Demand is the amount of a good or service required to fulfill the needs of customers in a Trade Area. It is mainly driven by the number of customers in the Trade Area and their purchasing power. The number of in-commuting workers and tourists visiting a community also impact the demand. Both demand and supply can be measured in terms of sales, square feet, or store equivalents.

### Measuring Retail and Restaurant Demand in the Study Area

This section calculates projected demand for various retail and restaurant categories. It differs from traditional methods in three ways: First, demand is estimated for only the Study Area and is based on a “proportionate share” of the entire Trade Area. Secondly, it excludes demand for certain large format stores that typically do not locate downtown. Finally, the following approach looks beyond local resident demand to include other market segments including in-commuters and visitors.

#### Key Assumptions Used

- The 2012 U.S. Economic Census of businesses with employees reasonably reflects resident behavior in the Trade Area.
- Trade Area resident spending is adjusted through modifications for income and lifestyles relative to U.S. averages.
- The Study Area’s ability to penetrate the Trade Area’s overall demand is a function of its commercial activity (and/or commercial space) as a share of the total Trade Area.
- Demand for other market segments (in-commuting workers and visitors) are estimated using state and national data describing their spending behaviors. Adjustments are made to reflect the Study Area’s ability to capture their spending potential.

#### Market Segments

For this analysis, three market segments that are important to the subject Study Area are examined to determine their spending potential (demand) and estimated sales (supply). The segments include:

- Residents of the Trade Area
- Workers – in-commuters
- Visitors - leisure and business

#### NAICS Categories Analyzed

This analysis provides an estimate of demand and supply in the Study Area for 14 categories of retail and restaurants. Most of these categories are presented at the three-digit NAICS level. The categories used (see following two pages) reflect the types of businesses found in many downtowns. Again, various categories are adjusted to exclude large format stores including home centers, warehouse clubs and supercenters.

Figure 7.1 - Retail Categories












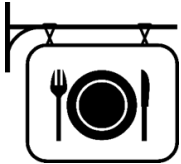


	NAICS	Description	
	442	Furniture and home furnishings stores	<ul style="list-style-type: none"> <li>Furniture Stores</li> <li>Floor Covering Stores</li> <li>Other Home Furnishing Stores</li> </ul>
	443	Electronics and appliance stores	
	444 Adj.	Building material and garden w/o Home Ctr	<ul style="list-style-type: none"> <li>Paint and Wallpaper Stores</li> <li>Hardware Stores</li> <li>Other Building Material Dealers</li> </ul>
	445	Food and beverage stores	<ul style="list-style-type: none"> <li>Convenience Stores</li> <li>Meat Markets</li> <li>Fish and Seafood Markets</li> <li>Fruit and Vegetable Markets</li> <li>Other Specialty Food Stores</li> <li>Beer, Wine and Liquor Stores</li> </ul>
	446	Health and personal care stores	<ul style="list-style-type: none"> <li>Pharmacies and Drug Stores</li> <li>Cosmetics, Beauty Supplies and Perfume Stores</li> <li>Optical Goods Stores</li> </ul>
	447	Gasoline stations including C-Stores	
	448	Clothing and clothing accessories stores	<ul style="list-style-type: none"> <li>Men's Clothing Stores</li> <li>Women's Clothing Stores</li> <li>Children's and Infant's Clothing Stores</li> <li>Family Clothing Stores</li> <li>Clothing Accessories Stores</li> </ul>
	451	Sporting goods, hobby, musical, and book stores	<ul style="list-style-type: none"> <li>Sporting Goods Store</li> <li>Hobby, Toy, and Game Stores</li> <li>Sewing Needlework, and Piece Goods Stores</li> <li>Musical Instrument and Supplies Stores</li> <li>Book Stores and News</li> </ul>
	452 Adj.	Gen Merch. w/o warehouse and supercenters	<ul style="list-style-type: none"> <li>Department Stores</li> <li>Dollar Stores</li> <li>All Other General Merchandise Stores</li> </ul>
	453	Miscellaneous store retailers	<ul style="list-style-type: none"> <li>Florists</li> <li>Office Supplies and Stationary Stores</li> <li>Gift, Novelty, and Souvenir Stores</li> <li>Used Merchandise Stores</li> <li>Pet and Pet Supplies Stores</li> <li>Art Dealers</li> </ul>

Figure 7.2 – Restaurant Categories

	<b>NAICS</b>	<b>Description</b>	
<ul style="list-style-type: none"> <li>Steak Houses</li> <li>Diners</li> <li>Fine Dining</li> <li>Family Restaurants</li> <li>Restaurants</li> </ul>		7224	Drinking places (alcoholic beverages) <ul style="list-style-type: none"> <li>Bars</li> <li>Cocktail Lounges</li> <li>Nightclubs</li> <li>Taverns</li> </ul>
		722511	Full-service restaurants
<ul style="list-style-type: none"> <li>Coffee Shops</li> <li>Ice Cream Parlors</li> <li>Doughnut Shops</li> <li>Snack Shops</li> <li>Cookie Shops</li> <li>Frozen Custard Shops</li> </ul>		722513	Limited-service restaurants
		722515	Snack and nonalcoholic beverage bars <ul style="list-style-type: none"> <li>Carryout Restaurants</li> <li>Drive – In</li> <li>Fast Food</li> <li>Pizza Deliveries</li> <li>Sandwich Shops</li> </ul>

### Trade Area Residents- Calculation of Retail and Restaurant Demand

The demand for businesses in the subject Study Area is based on a “proportionate share” of the broader Trade Area as defined earlier. Typically, not all categories are represented by the same Trade Area as some stores pull from a larger “destination Trade Area” while others pull from a smaller “convenience Trade Area.” For purposes of this analysis, a single Cross Plains Trade Area was used as a basis for this demand analysis. The subject Study Area will compete for a share of this demand.

Spending potential (or Demand) for each business category reflects the assumptions listed below. The actual calculations are presented later in this section in the worksheet titled “Demand by Market Segment.”

Assumption	Description
Population	Number of residents in the respective Trade Area
Spending Per Capita	U.S. sales in each store category (per the 2012 US Economic Census) divided by U.S. population
PCI Index (U.S.=100)	The per capita income in the Trade Area indexed to the U.S. per capita income (per the most recent US Census)
Behavioral Index (US=100)	A subjective local modifier of consumer behavior indexed to the U.S. average consumer. This factor accounts for regional competition, demographic, and lifestyle factors that would increase (>100) or decrease (<100) a person’s likelihood to purchase in a particular business category in the Study Area
Trade Area Spending Potential	The result of multiplying the above variables
SA/TA Establishments	A measure of the current commercial activity based on the number of businesses (or retail square feet) in the Study Area (SA) as a percent of those in the Trade Area (TA). This is also defined as “proportionate share”
Study Area Spending Potential	Multiplication of Trade Area Spending Potential and SA/TA establishments produces Trade Area resident demand that could be captured in the Study Area based on its proportionate share



### In-Commuters - Calculation of Retail and Restaurant Demand

Study Area worker demand potential is based on the number of employees in the Village, multiplied by worker spending as estimated by the International Council of Shopping Centers (2012). Sales are then allocated among the retail and restaurant categories in proportion to Trade Area resident spending. A local modifier or behavioral index (US=100) is applied to account for the amount of retail and dining offerings in the subject district relative to other office districts in the country.

Spending potential (or Demand) for each business category reflects the assumptions listed below. The actual calculations are presented later in this section in the worksheet titled “Demand by Market Segment.”

Assumption	Description
Worker Population	Number of in-commuting employees in the Village. While many are also Trade Area residents, their frequent presence in the district may reflect spending potential over and above that of residents.
Spending Per Year	U.S. annual sales in each store category are based on estimates by the International Council of Shopping Centers (2012). They are distributed among business categories according to the 2012 US Economic Census.
Behavioral Index (US=100)	A subjective Behavioral Index (US=100) is applied to account for the amount of retail and dining offerings in the subject district relative to other business districts in the country.
Study Area Spending Potential	Multiplication of Worker Population, Spending Per Year, and the Behavioral Index produces the amount of worker demand that could be captured in the Study Area.

## Visitors - Calculation of Retail and Restaurant Demand

Overnight and day visitor demand is based on total Wisconsin Department of Tourism traveler spending estimates for Dane County. Sales were then allocated among the retail and restaurant categories in proportion to Trade Area resident spending. A percent of these sales were allocated to the Study Area based on number of restaurants in the Study Area as a percent of those in the county (SA/Co Estab.). A local modifier, Behavioral Index (Co.=100) is applied to account for attributes of the Study Area as an inviting place for visitors relative to the county as a whole.

Spending potential (or Demand) for each business category reflects the assumptions listed below. The actual calculations are presented later in this section in the worksheet titled "Demand by Market Segment."

Assumption	Description
Annual Visitor Spending-County	Direct annual spending by visitors as reported by the State Department of Tourism, coupled with the distribution of sales reported by the 2012 U.S. Economic Census divided by U.S. population
SA/Co. Establishments	A measure of the current hospitality industry activity: the number of restaurants in the Study Area (SA) as a percent of those in the County (Co)
Behavioral Index (US=100)	A subjective Behavioral Index (US=100) is applied to account for attributes of the Study Area as an inviting place for visitors relative to the county as a whole
Study Area Spending Potential	Multiplication of Worker Population, Spending per Week, and the Behavioral Index produces the amount of worker demand that could reasonably be captured in the Study Area based on its current retail and restaurant mix

## Retail and Restaurant Demand Calculation

The first worksheet that follows is titled “Demand by Market Segment” and calculates the total demand in each of the three market segments, for 14 retail and restaurant categories. Demand potential from each segment reflects dollars that could reasonably be captured in the Study Area. Again, to make the analysis most relevant to downtowns, it excludes spending potential at large format stores including home centers, warehouse clubs, and supercenters. **Data in red are assumptions specific to this community.**

## Retail and Restaurant Supply Calculation

The second worksheet is titled “Demand and Supply Gap Analysis.” This worksheet contains the estimated supply of businesses in the Study Area measured in terms of square feet of space and number of businesses. Estimates were based on a physical inventory of businesses and are subject to error.

Dividing \$Demand by the average sales per US establishment (per the 2012 US Economic Census), results in the generation of a rough estimate of the number of stores that can be supported in each business category. While there are significant limitations in using such averages (sales vary widely among businesses in each category), it does provide a starting point for the comparison of demand and actual supply (existing) businesses.

## Comparing Demand & Supply - Gap Analysis

The “Demand and Supply Gap Analysis” provides a comparison of demand and supply in terms of number of operations and square feet. This is called a gap analysis.


The following summary table presents demand and supply in terms of square feet of space and number of establishments. These data were calculated based on the U.S. Census and other sources obtained by the UW-Extension, Center for Community and Economic Development. **Data in red are assumptions specific to this community.**















Exhibit 7.3: Current 2017 Retail and Restaurant Demand and Supply Gap Analysis















	<u>Square Feet</u>				<u>No. of Establishments</u>		
	<u>Total Study Area Demand</u>	<u>Total Study Area Supply</u>	<u>Gap</u>		<u>Total Study Area Demand</u>	<u>Total Study Area Supply</u>	<u>Gap</u>
Total Retail	68,129	88,000	19,871		15	10	(5)
Total Food and Drink	39,839	17,000	(22,839)		14	8	(6)

### Key Points:

- The supply of retail space exceeds demand because there are a few large retailers within the Study Area (grocery store, implement dealership, variety store, etc.). For comparison, other small communities like Mount Horeb, Lake Mills, in Cambridge generally only have small stores within their downtown areas.
- However, Cross Plains has fewer small format retail stores as found in many other small town downtowns.
- The Study Area appears to have a shortage of food and drink operations in both square feet and number of establishments.

Demand by Market Segment																		
6/6/2017																		
Resident Demand:																		
<div></div>																		
For: <span>Cross Plains</span>																		
Destination or Convenience Trade Area																		
Trade Area Population																		
Spending Per Capita																		
PCI Index (US=100)																		
Behavioral Index (US=100)																		
Trade Area \$Potential																		
SA/TA Estab.																		
Study Area \$Potential																		
Worker Population																		
Spending Per Year																		
Behavioral Index (US=100)																		
Study Area \$Potential																		
Annual Visitor Spending in County																		
SA/Co. Estab.																		
Behavioral Index (Co.=100)																		
Study Area \$Potential																		
Total Study Area \$Potential																		
Total \$ Demand																		

442		Description (excluding most large format stores)	Convenience	14,213	\$ 284	145	50	\$ 2,926,501	40.0%	\$ 1,170,600	1,115	\$ 135	-	\$ -	\$ 11,546,530	1.5%	-	\$ -	\$ 1,170,600				
443		Electronics and appliance stores	Convenience	14,213	\$ 329	145	25	\$ 1,695,304	40.0%	\$ 678,121	1,115	\$ 157	-	\$ -	\$ 13,377,664	1.5%	-	\$ -	678,121				
444 Adj.		Building material and garden w/o Home Ctr	Convenience	14,213	\$ 472	145	75	\$ 7,307,388	40.0%	\$ 2,922,955	1,115	\$ 225	50	\$ 125,381	\$ 19,220,900	1.5%	-	\$ -	3,048,336				
445		Food and beverage stores	Convenience	14,213	\$ 1,979	145	75	\$ 30,640,340	40.0%	\$ 12,256,136	1,115	\$ 943	100	\$ 1,051,462	\$ 80,594,452	1.5%	100	\$ 1,208,917	14,516,515				
446		Health and personal care stores	Convenience	14,213	\$ 867	145	100	\$ 17,891,072	40.0%	\$ 7,156,429	1,115	\$ 413	100	\$ 460,466	\$ 35,294,674	1.5%	100	\$ 529,420	8,146,315				
447		Convenience Stores in Gas stations (excluding gas)	Convenience	14,213	\$ 540	145	50	\$ 5,572,788	40.0%	\$ 2,229,115	1,115	\$ 257	100	\$ 286,856	\$ 21,987,475	1.5%	100	\$ 329,812	2,845,784				
448		Clothing and clothing accessories stores	Convenience	14,213	\$ 742	145	-	\$ -	40.0%	\$ -	1,115	\$ 354	-	\$ -	\$ 30,216,942	1.5%	-	\$ -	-				
451		Sporting goods, hobby, musical, and book stores	Convenience	14,213	\$ 246	145	75	\$ 3,814,996	40.0%	\$ 1,525,998	1,115	\$ 117	25	\$ 32,729	\$ 10,034,728	1.5%	25	\$ 37,630	1,596,358				
452 Adj.		Gen Merch. w/o warehouse and supercenters	Convenience	14,213	\$ 182	145	50	\$ 1,877,593	40.0%	\$ 751,037	1,115	\$ 87	25	\$ 24,162	\$ 7,408,057	1.5%	-	\$ -	775,199				
453		Miscellaneous store retailers	Convenience	14,213	\$ 311	145	75	\$ 4,812,529	40.0%	\$ 1,925,012	1,115	\$ 148	50	\$ 82,574	\$ 12,658,579	1.5%	-	\$ -	2,007,586				
7224		Drinking places (alcoholic beverages)	Convenience	14,213	\$ 63	145	75	\$ 972,191	40.0%	\$ 388,876	1,115	\$ 60	75	\$ 49,770	13,845,707	1.5%	75	\$ 155,764	594,410				
722511		Full-service restaurants	Convenience	14,213	\$ 714	145	50	\$ 7,370,428	40.0%	\$ 2,948,171	1,115	\$ 677	100	\$ 754,633	157,451,809	1.5%	75	\$ 1,771,333	5,474,137				
722513		Limited-service restaurants	Convenience	14,213	\$ 590	145	50	\$ 6,090,505	40.0%	\$ 2,436,202	1,115	\$ 559	125	\$ 779,483	130,109,278	1.5%	75	\$ 1,463,729	4,679,414				
722515		Snack and nonalcoholic beverage bars	Convenience	14,213	\$ 98	145	75	\$ 1,524,615	40.0%	\$ 609,846	1,115	\$ 93	125	\$ 130,084	21,713,206	1.5%	75	\$ 244,274	984,203				
Total Retail																			\$ 2,063,631			\$ 2,105,779	\$ 34,784,815
Total Food and Drink																			\$ 1,713,969			\$ 3,635,100	\$ 11,732,165
Total Retail																			6%			6%	100%
Total Food and Drink																			15%			31%	100%

Demand & Supply Gap Analysis 6/6/2017										
Est.	Cross Plains	Total \$ Demand	\$/SF U.S. Average	S.F. Demand	S.F. Supply	Gap	U.S. Sales/Estab.	No. Estab. Demand	No. Estab. Supply	
NAICS	Description (excluding most large format stores)	Total Study Potential		Total Study Area SF Potential	Total Study Area Actual	Gap				Gap
442	 Furniture and home furnishings stores	\$ 1,170,600	\$ 284	4,122	-	(4,122)	1,726,206	0.7	-	(0.68)
443	 Electronics and appliance stores	\$ 678,121	\$ 647	1,048		(1,048)	2,123,245	0.3	-	(0.32)
444 Adj.	 Building material and garden w/o Home Ctr	\$ 3,048,336	\$ 391	7,796	13,000	5,204	2,067,780	1.5	2	0.53
445	 Food and beverage stores	\$ 14,516,515	\$ 573	25,334	32,000	6,666	4,213,071	3.4	2	(1.45)
446	 Health and personal care stores	\$ 8,146,315	\$ 901	9,041	19,000	9,959	2,943,188	2.8	3	0.23
447	 Convenience Stores in Gas stations (excluding gas)	\$ 2,845,784	\$ 480	5,929	7,000	1,071	1,200,000	2.4	1	(1.37)
448	 Clothing and clothing accessories stores	\$ -	\$ 353	-	-	-	1,580,253	-	-	-
451	 Sporting goods, hobby, musical, and book stores	\$ 1,596,358	\$ 292	5,467	4,000	(1,467)	1,670,268	1.0	1	0.04
452 Adj.	 Gen Merch. w/o warehouse and super centers	\$ 775,199	\$ 214	3,622	13,000	9,378	1,588,244	0.5	1	0.51
453	 Miscellaneous store retailers	\$ 2,007,586	\$ 348	5,769		(5,769)	912,393	2.2		(2.20)
7224	 Drinking places (alcoholic beverages)	\$ 594,410	\$ 192	3,096	1,000	(2,096)	472,205	1.3	1	(0.26)
722511	 Full-service restaurants	\$ 5,474,137	\$ 300	18,247	8,000	(10,247)	967,204	5.7	3	(2.66)
722513	 Limited-service restaurants	\$ 4,679,414	\$ 350	13,370	7,000	(6,370)	824,707	5.7	3	(2.67)
722515	 Snack and nonalcoholic beverage bars	\$ 984,203	\$ 192	5,126	1,000	(4,126)	564,069	1.7	1	(0.74)
	Total Retail	\$ 34,784,815		68,129	88,000	19,871		15	10	(5)
	Total Food and Drink	\$ 11,732,165		39,839	17,000	(22,839)		14	8	(6)

## SECTION 8: RECOMMENDATIONS OF THE STUDY TEAM

*This section provides recommendations based on the analysis of the report and the insights of study team members. The study team met several times to discuss data findings, summarize these findings, and draw out key points. The following recommendations are those of the study team and are presented here as a starting point for community dialogue.*

### Market Opportunities

The following business opportunities were identified based on demand and supply calculations, consumer preferences (as determined through survey data), peer community visits, and analysis of the demographics and consumer characteristics of residents of the trade area.

These opportunities can be filled through business retention and expansion efforts, as well as business recruitment efforts. Strategies will be discussed in this section.

#### Restaurants

There is a significant supply gap for both full service and limited service restaurants, as indicated in the demand and supply calculations. The Cross Plains retail area could absorb several new restaurants to just serve the trade area. These restaurants could also capture business from commuters and visitors, if they are unique and positioned according to commuter/visitor needs.

The following restaurant types might be supported based on research findings:

1. Casual dining establishments that are family friendly, serve a range of healthy foods at moderate prices, and have ambiance
2. Ethnic restaurants (non-chain), in particular an authentic Mexican and a high-end Italian
3. Healthy, local food restaurants with local ownership, reflecting the farm-to-table trend
4. Microbreweries with food that can appeal to families and young adults
5. Fine dining that can appeal to people with high disposable incomes and draw visitors
6. Fast food/Takeout establishments, both at the high end and lower end

Given that Cross Plains is situated on a major highway leading both into the cities of Middleton and Madison, and leading out toward Spring Green, commuters and travelers (for example, those going to the American Players Theatre) would likely frequent food establishments that provided grab-and-go sandwiches, salads, and soups. The above restaurant types could also provide food to-go. Likewise, recreational visitors to the region would frequent restaurants or establishments that provided grab-and-go foods, particularly if they are perceived as healthy.

#### Retail

Residents indicated that they would like to see expanded retail options to provide goods and services that meet the needs of residents first. Residents want to shop closer to home rather than going to Madison or Middleton for goods. Residents expressed a desire for a variety of small, independent shops. There were also many responses that indicate the desire to maintain the small-town feel, and the appeal to visitors. Visitors also expressed desire for expanded retail and restaurant establishments. Visitors were more likely to indicate preference for sporting goods or arts and crafts stores. Respondents desired locally owned businesses over “chains.”

The survey responses, peer community visits, demographics and demand and supply calculations indicate opportunities in the following areas:

1. Hardware store. Plans for a new hardware store are underway

2. A small general merchandise store, a thrift store, and health and wellness focused retail
3. Small independent stores that would appeal to visitors and enhance the small town feel such as art galleries, bookstores, bakery, specialty foods, and hobby/craft shops
4. Specialty clothing store (sporting, boutique, or second-hand/vintage)

A unique feature of Cross Plains is its location amidst natural areas (prairies, hills and valleys, the Black Earth Creek, the Ice Age Trail) and its consequent appeal to recreational visitors. These visitors pose an additional market opportunity for:

- 1) Sporting goods stores (e.g., focused on hiking, biking)
- 2) A fly shop (fishing equipment)

### **Services**

Residents and non-residents alike expressed interest in professional and personal services. These include:

1. Spa & salon
2. Health and wellness center
  - Support Life Foundation's proposal to open a wellness and community center
3. Car wash
4. Visitor lodging
5. Address gap in day care supply by supporting the growth or establishment of day care centers

### **Gathering Spaces**

- Destinations that provide community residents with opportunities to gather and recreate (e.g., community center, art center/studio, and places for indoor recreational activities for young people (laser tag, gymnastics, etc.).

## Business Retention and Expansion

Expanding markets and assuring the viability and longevity of existing businesses is of equal or greater importance to recruiting and establishing new businesses. The Cross Plains Area Chamber of Commerce's Business Development Committee has already put much emphasis on business retention, and – taking into account the results of this market analysis – recommends the following actions:

1. The Business Development Committee, in partnership with the Village Board, establish a strategic, "Comprehensive Business Development Plan" for the retail area.
  - a. Establish a collaborative team to develop an implementation plan based on this market analysis and the Village Strategic downtown vision. Determine if further information is needed for this plan.
  - b. Plan should address the issue of street parking.
  - c. Share the plan with businesses and the public through the Chamber and Village communication channels.
  - d. Use the plan to both assist existing businesses with building a customer base and with recruitment of new, complementary businesses.
2. Increase Chamber-led community/business marketing and communication efforts to promote local businesses.
  - a. Spearheading and promotion of "shop local campaigns" (see below).
  - b. Business to business cross marketing.
  - c. Community branding – marketing Cross Plains as a destination.
3. Establish a "Shop Local Campaign" to encourage residents to increase patronage of local retail and restaurants.
  - a. Reach out to Dane Buy Local to learn about these campaigns and to get promotion support.
  - b. Experiment with promotional activities including an "Annual Business Passport" and "Small Business Saturdays."
  - c. While promoting "shop-local" can be beneficial for existing businesses, it will not be feasible without simultaneously increasing the retail opportunities in the downtown area. However, the existence of a buy local campaign could help with recruitment and entrepreneur development efforts, in that new businesses would know that they are supported in their marketing efforts.
4. Focus on bringing people into the downtown retail area through events.
  - a. Chamber of Commerce support and promotion of events that appeal to recreational visitors in collaboration with non-profit organizations that have interest in the natural resources of the area (e.g., Ice Age Trail Association, Trout Unlimited, Swamplovers, Prairie Enthusiasts).
  - b. Use events to build community cohesion and appeal to young families and new residents
  - c. Encourage local businesses to sponsor, promote and participate in these events.
  - d. Increase customer base through special events, classes, and activities.
  - e. Activities that connect volunteers, retirees, and seniors to life-style activities appeal to residents who choose to live or visit Cross Plains. Link these activities to downtown retail. There are many involved seniors in the area looking for opportunities to be engaged and to do things for the community.
5. Consider establishing a Business Retention and Expansion program to assist existing businesses.



- a. The UW-Extension Center for Community Economic Development provides a “Downtown and Business District Market Analysis toolbox” to guide such programs. Available at: <https://fyi.uwex.edu/downtown-market-analysis/>.
- b. Use one on one interviews to know the needs and concerns of businesses.
- c. Develop business mentorship opportunities to encourage entrepreneurs and to assure succession planning for those well-established businesses where the business owner may be interested in retirement.
- d. Help existing businesses understand expansion opportunities and plan for expansion.

## Business Attraction

Many of the recommendations for enhancing the Retail Development Area are contingent on increasing the number and diversity of retail, restaurant, and service businesses, with the expectation that there is opportunity for growth, due to the demand and supply gap for residents of the trade area, as well as to the potential to capture demand from visitors and commuters. The following recommendations address business attraction, either through recruitment of existing businesses, or through promotion of entrepreneurship from within the trade area.

1. Determine whether it is feasible to create and support a separate Economic Development Corporation (EDC) or Economic Development Professional.
  - a. Find funding opportunities to support this entity through TIF, statewide grants, and local support.
  - b. Designating an organization or individual responsible for business recruitment will establish clear lines of accountability.
  - c. An implementation team could assist in these efforts.
  - d. The implementation team should include: business representatives, retired business owners, members of the Village Board, and the Chamber of Commerce.
2. Focus business recruitment efforts on three different segments.
  - a. Recruit retail businesses that serve the residents (e.g., hardware store, hair salon, clothing store, restaurants).
  - b. Recruit retail businesses that fit the community niche (e.g., outdoor activities, recreational activities, sporting/fishing, health and wellness).
  - c. Recruit businesses in sectors other than retail and restaurant that serve to increase the number of people working in town.
    - i. Commercial business facility that could house tech businesses, professional services, or research industries
    - ii. Professional co-working space to encourage entrepreneurship
    - iii. Large employer
3. Establish a community marketing ad campaign to promote Cross Plains as a good place to do business.
  - a. Develop attractive, powerful recruitment and marketing materials.
  - b. Highlight objective information needed in site selection.
  - c. Provide market analysis data to illustrate opportunities aligned with the business recruitment strategy.
  - d. Community marketing with the goal of recruiting new businesses and industry would be done in conjunction with efforts to create a consistent brand for the community.
4. Develop an inventory of open spaces and buildings that are available for development.
  - a. Make this information available to prospective businesses.
  - b. Learn how to effectively market the space available.
  - c. Work with developers to specify space needs for incoming businesses.
5. Develop entrepreneurship programs and resources.
  - a. Foster networking and technical assistance for and among startup businesses.
  - b. Encourage young people to consider entrepreneurship by establishing an apprenticeship program with existing businesses.

6. Educate the community on business development opportunities and its impact on: property taxes, quality of life, sustainability, and natural resource conservation.

## Resident and Visitor Experience

In order to attract residents and visitors (included here are also in-commuters) to the Retail Development Area (RDA), it is important that visitors and residents have **quality experiences** during the times they are shopping, eating, or recreating in that area. Business owners individually can assure the quality of a visit to their own establishment is positive and collectively – with the assistance of the Cross Plains Area Chamber of Commerce and the Village Board – they can influence the perception visitors hold of the entire RDA. The Business Development Committee recommends the following to enhance resident and visitor experience:

1. Develop a business and non-business mix that caters both to the needs of residents (while taking into account market supply and demand ratios) and recreational visitors that come to the area.
  - a. Tailor business recruitment efforts to prioritize businesses that will meet these needs.
  - b. Incorporate non-business facilities and activities preferred by the community into the comprehensive business development plan for the retail area.
    - i. Community and family oriented recreation and activity areas (such as a recreation center/senior center).
    - ii. Public playground, pocket park, or recreational space.
    - iii. Arts and culture venues.
    - iv. Access to natural areas.
2. Improve the physical infrastructure, parking options, area aesthetics, and signage.
3. Work with business-owners to build a sense of hospitality and to welcome guests in such a way as to build loyalty and return visits.
4. Enhance relationships with local organizations to address the broader issue of community-wide connectivity.
  - a. Build capacity to co-sponsor events.
  - b. Invite these organizations to develop floats, booths, or activities for events.
  - c. Develop shared understanding of how natural resource stewardship and conservation can go hand in hand with community economic development through educational programming.
5. Create a walkable community, with accessible sidewalks throughout the Retail Development Area.
6. Increase recreation opportunities and activities.

## Improving the Physical Environment

Improving the physical environment of the Retail Development Area will position Cross Plains for successful economic development. By assuring that first impressions of the community are positive, the community will have begun to “set the table” for business recruitment and customer retention. Positive first impressions include providing a clean, safe, friendly, and well-maintained atmosphere.

1. Enhance aesthetics of the Retail Development Area to be consistent with a cohesive downtown brand.
  - a. Incorporate signage to signify and communicate the brand.
  - b. Retain and enhance the historic flavor of the community.
  - c. To the extent possible, consider architecture that complements local history or outdoor recreation flavor.
2. Use the “Comprehensive Business Development Plan” as guidance for identifying appropriate business locations.
  - a. Include a space utilization plan that addresses aesthetics, design, and placement of businesses.
    - i. Identify what kind of businesses belong on Main Street and which belong on Bourbon Road.
    - ii. For Main Street, specify where individual business clusters would be located, recognizing that a business district should have retail continuity and stretch less than one – quarter mile.
    - iii. Address placement and orientation of businesses (e.g., facing the creek or the highway).
    - iv. Enhance the use of the Mill Creek Parkway area.
  - b. Consider designated, off-street parking.
  - c. Address rehabilitation of abandoned or un-kept properties.
  - d. Address where greenspace, community gathering spaces, and recreation areas will be located.
3. Promote walkability and access to natural resources, green spaces, and recreation opportunities.
  - a. Identify access points to hiking trails, increase signage and wayfinding from the trails to the downtown retail.
    - i. Incorporate community brand into signage and wayfinding.
    - ii. Link the Retail Development Area to natural areas through consistency in signage.
  - b. Assure that sidewalks are available in all retail focused areas while improving crosswalks for safety and aesthetics.
  - c. Connect bike paths and routes to the Retail Development Area.
  - d. Work on connectivity to make this a walkable community.
4. Support the implementation of the Glacier’s Edge Square Redevelopment Plan.

## Marketing and Branding Strategies

Marketing and branding are methods to attract both customers and businesses to the community. Having a cohesive community brand will improve marketing, both of the community and of businesses within the community. Identifying a unique brand or niche for the community may provide guidance as to what business mix will complement those businesses oriented toward meeting the needs of residents.

1. Create a Village ad hoc committee to develop a community “brand” for the Village of Cross Plains.
  - a. Establish marketing goals and a communication plan that will result in increased consumer spending, visitation, sidewalk traffic, and participation in events.
  - b. Develop marketing materials for businesses that adhere to the community brand.
  - c. Partner with and support regional branding efforts.
2. Consider creating a “niche” for the broader region, possibly related to natural resources and/or health and wellness.
  - a. The niche could highlight the hills and valleys, the Creek, and the prairies.
  - b. Health and wellness can build on recreational activities (hiking, biking, fishing) as well as activities for physical health and organic/local produce.
3. Implement marketing efforts to promote the community “brand” and area “niche.”
  - a. Engage community volunteers in lifestyle activities that relate to the agreed-upon niche or theme. These established residents could form a network of ambassadors welcoming visitors to the lifestyles and interest of their community.
  - b. Have businesses (both existing and future) offer classes and events to evoke interest and bring people into the Study Area because of the theme/niche.
  - c. Identify opportunities to create events, educational activities, and recreational activities around the niche.
  - d. Advertise regionally; collaborate with other Villages to promote the region.
  - e. Support the goals of the Life Foundation to promote healthy living and a healthy community. Included in meeting these goals is building a wellness and community center.

## Organizing for Action

Previous sections have focused on strategies to achieve business retention, expansion, and recruitment, and how to increase exposure so as to attract people to the Retail Development Area. This section puts forth a plan for how to work with the Village Board to increase communication and collaboration in strengthening Cross Plain's economic development efforts.

- 1) The Chamber will share the results of the Market Analysis with stakeholders through online and printed reports and meetings including the Village Board, Chamber members, and the public.
  - a. Initial presentations will be to the Village Board and Chamber Board.
  - b. Offer public input sessions for the whole community
    - i. Incorporate public input in consideration of a "Comprehensive Business Development Plan" and/or Village "brand."
  - c. Make the results of this study accessible to the business development community.
- 2) The Chamber will collaborate with the Village Board to determine organizational structure and implementation strategies.
  - a. Establishing a strategic, "Comprehensive Business Development Plan" for the retail area.
  - b. Creating a separate Economic Development Corporation (EDC) or Business Recruitment Team to work with the Chamber and the Village that is empowered to make decisions about economic development and has a designated liaison with the Village Board.
  - c. Launching a formalized business retention and expansion program.
  - d. Creating a position and/or hiring a consultant, possibly housed within the Village, who would be responsible for business expansion, retention, and recruitment.
- 3) Enhance communications between the Chamber, the Village Board, residents and businesses.
  - a. Add regular reports from the Chamber to the Village Board to the meeting agenda.
  - b. Reporting and communication can be enhanced by maintaining or designating responsibility to a liaison to and from the Chamber Board to the Village Board.
- 4) Define roles for the Village Board, the Chamber, and other entities regarding business development.
- 5) Develop partnerships with local, civic organizations.
  - a. To sponsor events
  - b. To market the community
  - c. To fund infrastructure improvement and conservation practices during new building construction.
- 6) Develop strategies that create community cohesion by encouraging residents to take on leadership roles on planning committees, attending events, and supporting local business.