

ORDINANCE NO. 10-32 AC CMS

AN ORDINANCE ADOPTING AN UPDATED MARKET STUDY FOR DOWNTOWN OBERLIN, OHIO, AND DECLARING AN EMERGENCY

WHEREAS, City Council through the enactment of Ordinance No. 02-93 AC CMS adopted a Market Study for downtown prepared by First Avenues, LLC; and

WHEREAS, City Council through the enactment of Ordinance No. 03-66 AC CMS adopted an updated Market Survey for Oberlin; and

WHEREAS, the State of Ohio Department of Development has identified certain additional requirements for inclusion in a Market Study for downtown; and

WHEREAS, Main Street Oberlin and the City of Oberlin have been working on updating past marketing studies for the downtown; and

WHEREAS, an updated Market Study must be in place and formally adopted by Council in order for the City to submit a Preliminary Threshold Application under the Community Development Block Grant (CDBG) Downtown Revitalization Program to the State of Ohio by May 21, 2010.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Oberlin, County of Lorain, State of Ohio, five-sevenths (5/7ths) of all members elected thereto concurring:

SECTION 1. That the updated Downtown Oberlin Market Study, a copy being on file with the Clerk of Council, is hereby formally adopted by Oberlin City Council.

SECTION 2. It is hereby found and determined that all formal actions of this Council concerning or relating to the adoption of this Ordinance were adopted in an open meeting of this Council, and that all deliberations of this Council and of any of its committees that resulted in such formal action, were in meetings open to the public in compliance with all legal requirements, including Section 121.22 of the Ohio Revised Code.

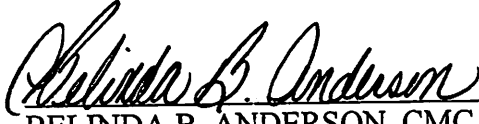
SECTION 3. That this ordinance is hereby declared to be an emergency measure necessary for the immediate preservation of the public peace, health and safety of the citizens of the City of Oberlin, Ohio, or to provide for the usual daily operation of a municipal department, to wit:

“in order to allow for the timely application for said Preliminary Threshold Application under the FY 2010 CDBG Comprehensive Downtown Revitalization Program in accordance with all applicable procedures and requirements”,

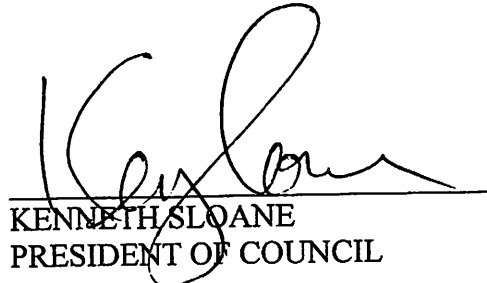
and shall take effect immediately upon passage.

PASSED: 1st Reading – May 17, 2010 (S)(E)
2nd Reading –
3rd Reading –

ATTEST:


BELINDA B. ANDERSON, CMC
CLERK OF COUNCIL

POSTED DATE: 05/18/2010


KENNETH SLOANE
PRESIDENT OF COUNCIL

EFFECTIVE DATE: 05/17/2010

Downtown Oberlin Market Analysis

**Produced by
Main Street Oberlin, Inc.
DBA Oberlin Main Street-Chamber**

Author: Geoffrey Comings, 2003
Update: Gregory Tisher, 2010

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Demographic Information

A study by First Avenues (2002) identified that the market for downtown Oberlin retailers consists of many diverse and overlapping subgroups. Consumers can be broadly divided into the following categories:

- Oberlin College students, faculty, and staff
- permanent residents of Oberlin and the surrounding rural townships
- non-college daytime workers
- shoppers and visitors from beyond a five-mile radius, including parents, alumni, and other visitors to Oberlin College

It is estimated that each of these three groups contribute roughly one-third of downtown Oberlin's annual sales. This allocation of sales among the three categories is based on interviews conducted with twenty-five Oberlin merchants.

Oberlin College Students – It is estimated that Oberlin College students spend at least \$13.5 million per year on retail purchases, based on national statistics collected by College Trak, Inc. Downtown Oberlin captures an estimated one-third of this spending or about \$1,500 per student per year. Primary consumer research is needed to verify these estimates both for total retail spending by students and downtown's market share.

Oberlin College has an enrollment of about 2,800 undergraduate students, 58% of whom are females. Its students come from all over the country, especially from the Northeast and Mid-Atlantic regions, and from forty-four countries. Tuition, room, and board at Oberlin College totals approximately \$50,000 per year. Median household (family) income for incoming freshmen in 1997 was \$71,500. Thus, Oberlin College students have access to funds (and consequently may have luxury tastes and market demands) though they themselves individually may have limited income.

Oberlin College Faculty and Staff – In addition to student spending, Oberlin College's approximately 900 faculty and staff also patronize downtown Oberlin. On average, annual faculty salaries range from \$45,000 to \$70,000. It is roughly estimated that downtown captures about half their daytime spending. A significant portion of Oberlin College faculty and staff do not reside in Oberlin.

Non-student Residents – Oberlin's nonstudent population includes about 3,600 households within zip code 44074. The area experienced modest housing growth in the past decade. Oberlin has a significant minority population accounting for approximately 18.5% of the city's total population. Oberlin's nonstudent population tends to be older than average with a high proportion of senior citizens. Even with students included, Oberlin's median household income (\$37,128) is similar to statewide and nationwide medians. A majority of Oberlin's housing was built prior to 1960. According to a Lorain County attitude survey (1998) by Lorain County Community College's Joint Center for Policy Research, Oberlin residents' top leisure activities are sports/exercising (46%), reading (25%), gardening (22%), arts and crafts (13%), movies

(9%), and music (8%). A 2003 survey exhibited similar results. These activities indicate potential support for specialty retailers in related categories.

Overall, it is estimated that downtown Oberlin captures only about 11% of the Oberlin nonstudent resident market retail spending, at present.

Visitors – Downtown Oberlin is unusual in that it draws almost one-third of its volume from out-of-town visitors and shoppers. Many such visitors are drawn to events and activities associated with Oberlin College and its conservatory of music. Out-of-town visitors include college parents, alumni, high school seniors, and conference attendees.

Central Business District Businesses

Downtown Oberlin currently has seventeen retail establishments, fourteen restaurants, twenty-five service businesses, and fifteen professional offices. Oberlin's downtown offers a wide variety of merchandise and services, distributed over all five major Retail Merchandising Groups. In fact, many downtown Oberlin retailers are represented in more than one category. Each merchandise group in downtown Oberlin is briefly profiled below:

- **Convenience Goods and Services:** Retailers that sell everyday products and services in which convenience is the driving factor. This group in Oberlin includes Gibson's Bakery & Food Mart, Ben Franklin, hair salons, and a variety of restaurants.
- **Home and Auto Goods:** Retailers that sell products for the home or automobile (but not homes and autos themselves). Watson Hardware anchors this group in downtown Oberlin at 5,500 square feet. Ben Franklin also devotes a significant amount of space to home goods as well. Other players in this category include Smith's Home Furnishings & Floor Coverings and the Oberlin Bookstore.
- **Fashion Goods:** Retailers that sell products that are worn by consumers. This is downtown Oberlin's weakest category. There is relatively little student-oriented clothing, short of some offerings at Dave's Army-Navy Store and Bead Paradise. The latter, which offers a large selection of beads, jewelry, and clothing, is a popular destination with specialty out-of-town shoppers as well as with local residents.
- **Leisure Goods:** Retailers that sell products used during the consumer's leisure time. This is the Retail Merchandising Group that most contributes to downtown Oberlin's unique and marketable identity as an arts and crafts destination. Oberlin has two bookstores, a comic & games store, and several retailers selling art, crafts, and accessories. There is room for further expansion in this category.
- **Dining and Entertainment:** Retailers that offer onsite consumption of food, beverages, paid entertainment or recreation. Downtown Oberlin's proximity to Oberlin College correlates with a particularly high concentration of fourteen restaurants. The only entertainment is the one-screen Apollo Theatre cinema.

Trade Area and Competition

Competition to downtown Oberlin includes Oberlin IGA, CVS, Wal-Mart, Dollar General, Dollar Tree, and Discount Drug Mart. The aforementioned are within two miles of the downtown district. Additional competition, including a Giant Eagle grocery store, is eight miles north in Amherst.

Discount Drug Mart, Wal-Mart, and others nearby take a significant portion of the Home Goods market. Outside Oberlin, especially in Elyria near Midway Mall, several superstore chains, including Target, Best Buy, Sears, Home Depot, and Lowe's, command high drawing power for Home Goods consumer choice. Specialty niches left open by department stores and discount general merchandisers have been addressed more thoroughly by superstores in almost every line of merchandise.

The regional fashion goods market is dominated by the Midway Mall area in Elyria, retail clusters along the State Route 58 corridor in Amherst, Cobblestone shopping plaza in Sheffield, and, increasingly, the Crocker Park "lifestyle center" (outdoor mall) in Westlake.

Leisure Goods are also readily available at nearby shopping centers. Borders and Barnes & Noble both have store less than a half-hour's drive from Oberlin. Also, nearby are a Michael's art and craft discounter and other similar stores.

While Oberlin has many restaurants, Oberlin residents frequent casual and fast food restaurants in the Midway Mall area, along the State Route 58 commercial corridor in Amherst, and in Crocker Park in Westlake. Two multi-screen cinemas are within comfortable driving distance of downtown Oberlin.

Market Opportunities

The results of several downtown Oberlin consumer surveys and studies – including Main Street Connections (1998), First Avenues (2002), Main Street Oberlin, Inc. (2003), and Oberlin College Student Senate’s “Buy Survey” (2009) – indicate that downtown Oberlin’s retail mix is largely unchanged. Shoppers in all studies indicated desires for greater merchandise and restaurant variety.

In July 2003, Main Street Oberlin, Inc. surveyed seventy-six Oberlin residents and visitors, asking them twenty-five questions pertaining to the downtown district. The following summarizes information gathered from those surveys. In response to the question “For what reasons have you visited downtown Oberlin in the past year?” the top five reasons were, in descending order, shopping, dining, banking, work, and art/museums.

Shopping and dining are the key reasons people visit downtown Oberlin, thus indicating that additional retail and restaurants are likely to succeed in the central commercial district. Banking is another reason for frequenting downtown. Three of downtown Oberlin’s four banks and credit unions are located on East College Street and are the primary draw on this block. Additional retail on this block would benefit foot traffic flow and would benefit from close proximity to the banks. Many people work in downtown Oberlin. The many shops and services benefit directly from this fact. Oberlin is a destination for concert-goers and persons interested in art and culture. Many people visit Oberlin for cultural events, yet few take full advantage of the downtown. Efforts must be made to draw a greater percentage of this group into the downtown stores.

It is clear from the survey results that Oberlin College has a prominent role in the community. This response is significant for numerous reasons. From a merchant perspective it offers many retail opportunities. Oberlin College also puts many concerts, art shows, theater performances, and guest speakers that bring people to the town and give area residents access to cultural resources. The college’s proximity to downtown also contributes greatly to the pedestrian character of the central business district. Survey results indicate that if the downtown is to remain vital the “town-gown” relationship must remain strong.

Nearly half of those surveyed indicated that Oberlin’s “quaint, small town atmosphere” comes to mind when thinking of the town. The pedestrian friendly character of the downtown also applies to this category. A frequently mentioned survey response referred how “merchants know [customers] by name.” As large scale developments begin to encroach, maintaining these qualities will become increasingly important to sustaining the downtown’s economic health and success. The same can be said for all the positive images of Oberlin.

Restaurants are a major attraction in the central business district. During a July 11, 2003, survey, some 53% of respondents indicated that they had been to an Oberlin restaurant. This is consistent with 56% who answered “dining” when asked “For what reasons have you visited downtown Oberlin in the past year?” The average amount spent on food on the day of the survey was \$10.00. With such interest in downtown dining it is reasonable to conclude that additional restaurants, especially ethnic ones, would thrive in Oberlin.

The results of the survey indicate a high degree of educational attainment among participants: almost 20% completed four-year undergraduate college (only) and an additional 35% had completed both undergraduate and graduate school. This segment of the population must be kept in mind when marketing the town as higher levels of education tend to correlate with higher earning potential. This demographic segment should also be kept in mind when marketing and recruiting new businesses. Existing stores ought to merchandise with this customer in mind.

Consumer Survey

Early in its inception, Oberlin's Main Street program conducted two consumer intercept surveys in downtown. Interviewers of diverse age and background were scattered throughout the commercial district to ask passersby a variety of questions. One of the questions that all participants were asked was "What, if anything, do you dislike about Oberlin that you would like to see improved?"

The answers that were most frequently given to this question were:

- more variety of stores
- better store hours
- more ethnic food
- more parking
- more clothing / basic goods
- downtown pharmacy

Additional downtown consumer surveys, including most recently an Oberlin College Student Senate-sponsored "Buy Survey" in spring 2009, have revealed similar findings. The "Buy Survey," for instance, indicated specific student consumer desires were particularly high for extended evening business hours, student-oriented clothing, and an Indian restaurant.

These answers are consistent with those given in a market study produced by Main Street Connections. That study recommended upgrading the retail tenant mix in downtown Oberlin as follows:

Downtown must focus on supplying retail needs that it can better serve than chain stores and shopping malls.

Regardless of store type, successful downtown merchants will offer superior customer service and product knowledge, unique specialty items, convenience, a pleasant atmosphere, and support for community causes.

There is adequate market potential for many new or additional retail uses in downtown Oberlin in all five major merchandising groups.

Note that some of these ideas could be integrated within the offering of existing downtown retailers as well as taking the form of new retail operations. The retail merchandise groups and the customer segments each should target are discussed below.

All customer intercept surveys, both past and present, indicate that Oberlin could likely support a greater variety of health, organic, and ethnic foods. Oberlin College draws students, faculty, and staff from all over the country and the world. Indian, Thai, Japanese, Mexican, Caribbean, and Ethiopian are all examples of ethnic restaurants that could thrive in Oberlin.

Some uses targeted to students will draw regional visitors and tourists as well.

The experience of shopping districts adjacent to some college campuses has shown that a good mix of student-oriented retailers can draw youth (and “youth-wannabes”), not just from the college and other nearby schools, but from all over the region. This has already happened with the arts and crafts stores in downtown Oberlin. For example, a business selling bicycles, skateboards, roller blades, and repair services could do well in downtown Oberlin. |

In addition to better serving the student market, there are opportunities to do the same for the local residential market.

While there is much nearby competition for this market, there are some areas that could fill in holes or compete with distant providers of like services. A shoe repair store, antiques, crafted household decorations, and pottery are all examples of store that could contribute to creating more variety to the current retail mix.

More fine dining restaurants and more art galleries are needed to build on the arts and crafts strengths.

Oberlin voters approved wine and liquor licenses within the city limits only within the past two decades. This, along with more fine dining establishments, should bring more people to town before and after the many fine performances that take place at Oberlin College. Also, Oberlin has surprising few art galleries in spite of its reputation. More are needed to achieve critical mass.

Merchant Survey

Over the course of three sessions in 2003, Main Street Oberlin, Inc. talked with twenty downtown merchants in order to gain a greater understanding of the issues they feel have the greatest impact on the city's central business district. The following summarizes key issues raised in these forums.

Parking

Participants in each of the focus groups showed concern about downtown parking. Key concerns involved:

- not enough parking
- public parking behind the stores needs to be more visible
- parking lots exhibit significant deterioration and require improved maintenance
- Oberlin College faculty, staff, and students are occupying too many parking spaces designated for shoppers
- most off-street parking is privately-owned, which creates bitterness

Needs of Existing & Potential Businesses in Downtown

- Oberlin needs to develop and promote a unified vision
- the unique qualities that help to form Oberlin's identity should be marketed to bring more business downtown
- efforts should be made to increase summer sales

Other Responses

In addition to the key concerns already mentioned, Oberlin's merchants had many other concerns and opinions on a wide range of topics.

- "Oberlin's stores have become too specialized with many stores offering the same goods and services."
- "It is too difficult to buy downtown property." Several business owners surveyed have been trying to buy the downtown building in which their business is located for many years.
- "Too much money is being exported from the city. In order for the downtown to thrive it will be necessary to figure out a way to keep Oberlin's dollars inside the city limits."
- "Rents in Oberlin's central business district are too high as are utility costs."

Business Activity

Within the last decade many changes have taken place downtown. One major change is the increased number of restaurants downtown. In some cases, these restaurants have filled vacant spaces. In other instances, they have replaced services and retail. The Main Street Connections (1998) marketing study for downtown Oberlin found that merchants and consumers expressed desires for more ethnic food, an upscale restaurant, and a health food store. By 2010, businesses have filled these categories, though, arguably, there is still market demand. A natural and organic foods market and café opened several years ago. A popular Asian-fusion restaurant serves quality meals at high prices and attracts diners from surrounding locations. Despite the progress that has been made in this area, much can still be done to serve unmet consumer requests. Both Main Street Oberlin's (2003) and Oberlin College Student Senate's (2009) surveys found significant market demand for increased ethnic dining, especially Indian and Thai.

Many new businesses have moved to downtown Oberlin in the past few years. Examples include: a comic & games store; a yoga studio; a used bookstore; an ice cream parlor; a photography studio; and printing & copy store. According to the First Avenues (2002) market study, many business owners would like to find larger spaces and/or would like to purchase the downtown property that they rent. Both desires have proven difficult to realize.

While past studies have discovered that half of downtown merchants have experienced flat or declining sales, it is important to note that out of the twenty-three businesses that participated in the merchant study (1998) all but four are still in business. Many downtown stores have been in operation for more than ten years; at least five downtown retailers have been in business for more than fifty years. In many respects, then, downtown Oberlin's business climate is fairly stable, especially when compared within a regional and statewide context.

There has been a surge in downtown Oberlin living over the past decade. The most prominent example is Sustainable Community Associates' new three-building East College Street Project mixed-use development. The complex, which is a "green" LEED-ND national pilot project, will bring thirty-three new residential units to the heart of downtown. About two-thirds of the new residential units will be condominiums; the remaining one-third will be "workforce housing" rental apartments. The complex opens in May 2010. According to the developers, condo sales have been brisk, even during the current (2010) national real estate downturn.

There are other residential units in downtown Oberlin. Underutilized upper story spaces in existing buildings have been converted to popular and profitable residential apartments, often rather upscale in style. Such units, for example, can be found on the third floor of 13 South Main Street and on the second floor of 15 South Main Street. Work is proceeding (2010) on the conversion of the second floor of 23 South Main Street – used only as storage for nearly fifty years – into a large high-end residential unit. Other downtown apartments are aimed at the Oberlin College student market – and are extremely popular with that consumer segment.

Business Attraction Strategies

Oberlin Main Street-Chamber works to retain and attract businesses in downtown. As pressures from “big box” development increase, it will become increasingly important for downtown Oberlin to capitalize on its strengths. In 1998, merchant surveys suggested the following ten qualities are vital to Oberlin’s economic health:

- ambiance – “friendly, safe, charming, cosmopolitan, cool”
- good mix and variety of businesses
- convenience for residents
- architecture / park / campus / compact scale
- foot traffic and pedestrian environment
- Oberlin College, museums, and concerts
- student market
- arts, culture, and history attractions
- free parking
- regional press coverage

Oberlin became an Ohio Main Street community as early as 2000. Main Street Oberlin, Inc., doing business as (DBA) Oberlin Main Street-Chamber since March 2010, formed as an independent 501(c)(3) nonprofit organization in 2002. The organization is directed by a volunteer Board of Trustees; daily operations are overseen by a full-time, salaried executive director. Some activities the organization has undertaken include:

- Creating a partnership with the city government and college to clean downtown on a regular basis. Litter is a significant problem as large numbers of students frequent the downtown. The central business district is now cleaned four days a week, making the downtown much more attractive and inviting.
- Oberlin Main Street-Chamber’s design committee has undertaken significant downtown beautification activities, including flower plantings, hanging flower baskets, and street banners.
- Bicycle racks were modified to be friendlier for users.
- Increase partnerships with Oberlin College to better promote downtown to college visitors.

These and other efforts by Oberlin Main Street-Chamber, city government, and other civic groups have helped make Oberlin a more desirable place to open and operate a business.

Other steps that have been taken to improve the downtown district include:

- listing the downtown district in the National Register of Historic Places, thus making downtown building rehabilitation projects eligible for federal and state historic preservation tax credit incentives
 - one downtown business (Apollo Theatre) has taken advantage of federal and state tax credits for its preservation-sensitive \$1.2 million rehabilitation

- designating the downtown as a Community Reinvestment Act (CRA) district
- redevelopment of a downtown “brownfield” space into a “green” LEED-ND national pilot mixed-use residential and retail complex
- City and State economic development loan programs to address façade renovations, leasehold improvements, purchase of equipment

Economic Development Tools

The City of Oberlin is an Enterprise Zone and Oberlin's central business district is a Community Reinvestment Area (CRA). There are several incentive programs offered through the Oberlin city government to encourage investment and create and retain jobs in the community. These economic development incentive tools include:

- Oberlin Business Assistance Revolving Loan Fund Program
- Oberlin Building Improvement Program
- Oberlin Façade Loan Program

Oberlin Main Street-Chamber continues to work closely with the City of Oberlin in developing a business acceleration program that could potentially lend low interest start up loans to developing companies and retail businesses alike. This program would also assist local property owners in our downtown with tenant recruitment.

Space Availability

Commercial property in downtown Oberlin has experienced few extended periods of vacancy. At present (2010) there are three vacant first floor spaces in the downtown district – all are away from the downtown district's true core. Vacancies are higher on upper floors, though a significant portion of those spaces presently function as residences, offices, service businesses, and storage. More work can still be done to minimize vacant upper floors.

A three-building complex opening in spring and summer 2010 will add thirty-three additional residential units (rental and condominium) and several new businesses spaces to the downtown district.

Current Marketing and Promotion

Downtown Oberlin is promoted by Oberlin Main Street-Chamber under the tagline “Downtown Oberlin: Experience the Unexpected!” While downtown Oberlin is marketed differently depending on the specific targeted consumer segment, concepts or themes informing and incorporated into image advertising and promotional events include:

- *Creativity* – arts, crafts, music, drama, performance, individual expression, educational, innovation
- *Environmental* – awareness, sustainable architecture, local and organic foods, pedestrian scale, green business products and practices, flowers, trees, greenspace
- *Welcoming* – family-friendly, local and independent businesses, safe, pedestrian friendly, center of community, fun, proximity and ease of travel to regional population centers, free parking, clean, attractive, social service / justice / awareness / mission
- *Heritage* – historic architecture, authentic, longtime local businesses, memory, tradition, abolition, underground railroad, progressive history, restored, contemporary design compatible with historic integrity

Potential for Revitalization

Many small Midwestern communities are struggling to bring back retail businesses and civic functions to their historic town centers. Automobile-oriented developments, e.g., malls, “strip malls,” and “big boxes,” compete with small towns for limited shopping dollars and in most cases the old downtowns are losing.

Downtown business districts are no longer the primary providers of goods and services to their communities. Many small towns have suffered from a complicated cycle of disinvestment: with businesses leaving, rental rates slip and property owners have less to invest in their buildings, giving the district a shabby, uncared-for appearance that makes it harder to attract new businesses.

As an Ohio Main Street community, Oberlin is committed to preserving the historic character and economic vitality of its downtown. Through the efforts of Oberlin Main Street-Chamber following the national four-point approach for “Main Street” revitalization, much work has already been done to guard against the deterioration of the downtown. A few of these activities include:

- Oberlin Main Street-Chamber’s organization committee plans and runs two monthly networking sessions for downtown business owners and other stakeholders. (The committee is also responsible for the organization’s financial stability and daily operations, including human resources.)
- The organization’s design committee has planted flowers downtown, orchestrated the installation of sixty-five downtown hanging flower baskets, recruited residents to help with annual downtown clean-up days, contracted a professional service to clean downtown three-to-four times per week, and developed a downtown banner program linked with the local schools.
- The organization’s promotion committee has organized a variety of events that have drawn thousands to the downtown to shop, recreate, and enjoy public space. Presently, this committee is responsible for eight annual events throughout the year, all occurring downtown.
- The organization’s economic restructuring committee runs business outreach and assistance, including workshops for entrepreneurship and information sharing about available business loan programs.

Oberlin College has recognized the importance of downtown’s vitality to the college’s continued success in its “Oberlin 20/20” planning document. An attractive downtown district will greatly benefit the college administration’s efforts to draw diverse and qualified students. Conversely, a deteriorated downtown – immediately adjacent to the college’s conservatory of music, for instance – would negatively affect the college’s recruitment of new students. Acting on this finding, Oberlin College has made many efforts to assist in ongoing downtown revitalization.

Oberlin's municipal government continues to invest money and staff time in projects that benefit the central business district.

- significant investment in downtown infrastructure, including street and sidewalk repairs and upgrades to water, electrical, and sanitary sewer lines
- TIF investment in a major new mixed-use development in downtown
- technical and aesthetic enhancements to downtown crosswalks and traffic lights
- promotion of the city through funds collected under a municipal bed tax
- works closely with Oberlin Main Street-Chamber on downtown issues, including parking, urban design, planning, property rehabilitation, and economic development

All of these efforts display a willingness to do what it takes to ensure that downtown Oberlin will continue to be the city's economic, cultural, and social core, i.e., a center of commerce and community. Oberlin's residents care deeply about what happens in and to the central business district and its immediate surrounds.

The scale and historic layout of the downtown, in addition to its close proximity to Oberlin College, creates a pedestrian-friendly design and a related high degree of foot traffic. These assets create an atmosphere that new development cannot provide. Shoppers looking for an authentic experience and unique retail establishments are pleasantly surprised to find these attributes plentiful in downtown Oberlin.

Issues, Trends, Patterns and Gaps

Although Oberlin's central business district appears to be vital and healthy, the Main Street Connections market strategy (1998) found that half of Oberlin's merchants were experiencing declining sales. The growth of nearby retail clusters in Amherst, Elyria, Sheffield, Westlake, and in Oberlin's south end combined with the present (2008-2010) national recession has only increased competitive pressures on downtown merchants unable to take advantage of economies of scale. In order to ensure that the downtown will remain vital and economically healthy it will be essential to market and build on the downtown's strengths. Respondents to Main Street Oberlin's consumer surveys (July 2003) gave the following replies to the following question: "For what reasons have you visited downtown Oberlin in the past year?" (Respondents were allowed to give more than one answer.)

- work – 22%
- dining – 57%
- banking – 34%
- shopping – 61%
- business with city government – 12%
- professional services – 8%
- visit bar – 12%
- visit family and/or friends – 25%
- attend conferences – 8%
- visit museum – 13%
- passing through – 4%

Other reasons that residents and visitors gave for why they spend time downtown are for the locally-owned shops, for its pedestrian-friendly atmosphere, for its historic character, and for people-watching. These percentages are remarkably similar to those included in both previous market studies.

Comments were also recorded regarding what prevents people from spending more time in Oberlin's central commercial district. The most frequently mentioned responses were:

- not enough basic goods
- store hours – close too early
- not enough variety of retail and restaurants
- traffic and parking

With "big box" pressures very real, downtown must focus on supplying retail niches and needs that it can better meet than chain stores, automobile-oriented developments, and shopping malls.

Oberlin's downtown merchants will have to offer superior customer service and product knowledge, unique specialty items, convenience, a pleasant atmosphere, and support for community causes. There is adequate market potential for many new or additional retail niches in downtown Oberlin in all five major merchandising groups. Some of these ideas could be

integrated within the offerings of existing downtown retailers as well as taking the form of new retail operations. The retail merchandise groups and the customer segments each should target are discussed below.

As indicated above, Oberlin could likely support a greater variety of health, organic, and ethnic foods. Oberlin College draws students, faculty, staff, and visitors from all over the country and the world. Indian, Thai, Japanese, Mexican, Caribbean, and Ethiopian are all examples of ethnic restaurants that could fare well in Oberlin.

SUPPLEMENTAL INFORMATION

**ANNUAL RETAIL SPENDING
ESTIMATES BY MARKET SEGMENT**

	<u>Estimated Total Annual Retail Expenditures</u>	<u>Estimated Downtown Oberlin Annual Retail Sales</u>	<u>Downtown Oberlin Market Share*</u>
<i>OBERLIN COLLEGE MARKET (35% of total)</i>			
1. Students (2,900)	\$13,500,000	\$4,400,000	33%
2. Faculty/Staff Daytime Spending (900)	<u>\$1,200,000</u>	<u>\$600,000</u>	<u>50%</u>
3. Oberlin College (1.+2.)	\$14,700,000	\$5,000,000	34%
<i>OBERLIN RESIDENT MARKET (33% of total)</i>			
4. Nonstudent Households, Zip Code 44074 (3,600)	<u>\$43,200,000</u>	<u>\$4,800,000</u>	<u>11%</u>
5. Oberlin Market (1.+4.)	\$57,900,000	\$9,800,000	16-17%
<i>VISITOR MARKET (32% of total)</i>			
6. Tourists and Visitors	<u>N/A</u>	<u>\$4,800,000</u>	<u>N/A</u>
TOTAL (3.+4.+6.)	N/A	\$14,400,000	N/A

* Represents downtown's share of each subgroup's total non-automotive retail expenditures.

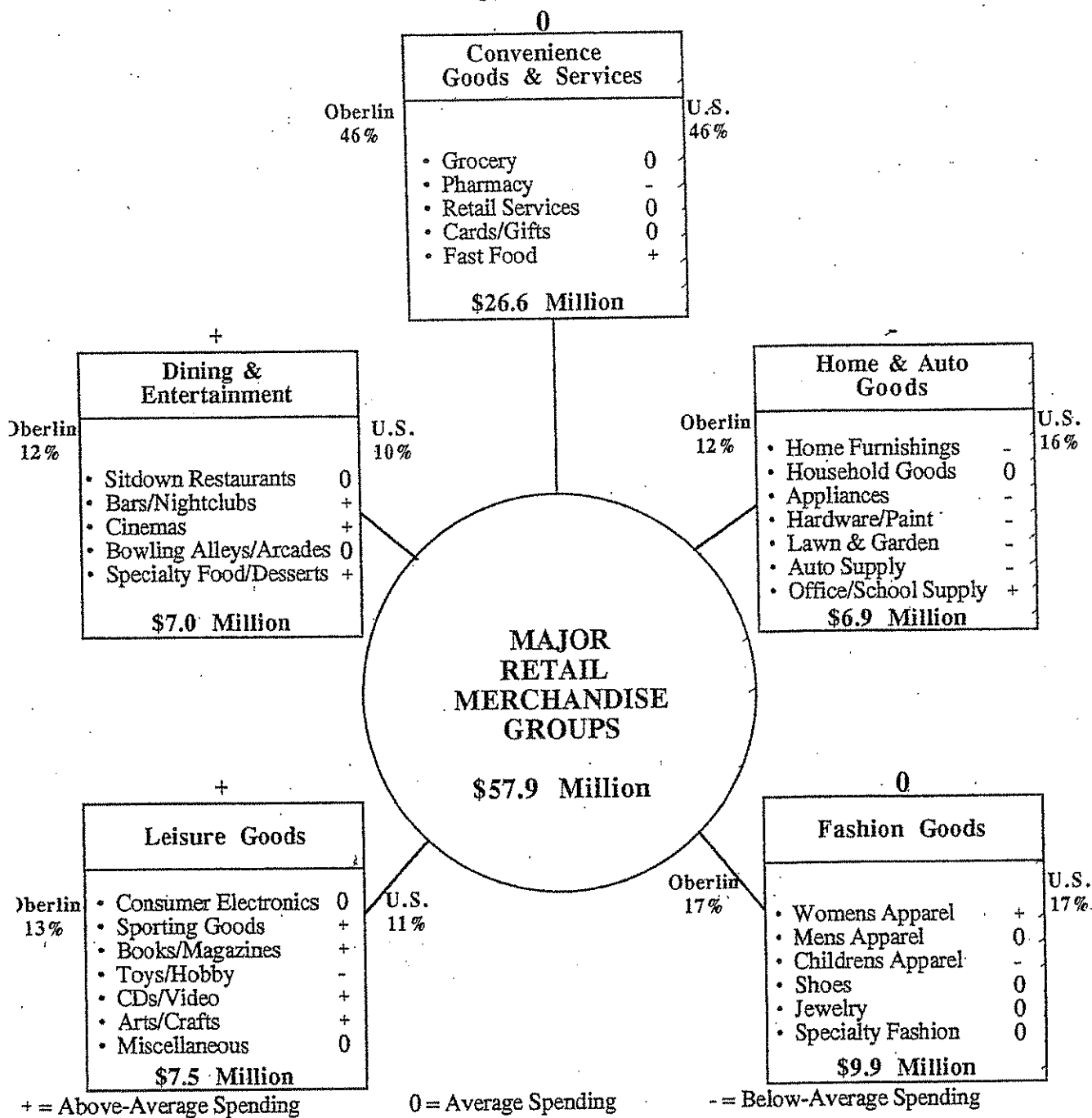
SOURCES: Boulevard Strategies, U.S. Department of Labor, College Trak, Inc., International Council of Shopping Centers, merchant interviews and CACI, Inc.

CLEVELAND AREA OF DOMINANT INFLUENCE

<u>County</u>	<u>Area in Square Miles</u>	<u>1995 Population</u>
Ashland	424	49,600
Ashtabula	703	101,400
Carroll	395	27,600
Cuyahoga	458	1,410,200
Erie	255	77,800
Geauga	404	85,500
Holmes	423	34,400
Huron	493	58,800
Lake	228	222,100
Lorain	493	277,000
Medina	422	131,300
Portage	492	147,300
Richland	497	129,600
Stark	576	374,000
Summit	413	528,000
Tuscarawas	568	86,400
Wayne	<u>555</u>	<u>106,200</u>
TOTAL A.D.I.	7,799	3,847,200

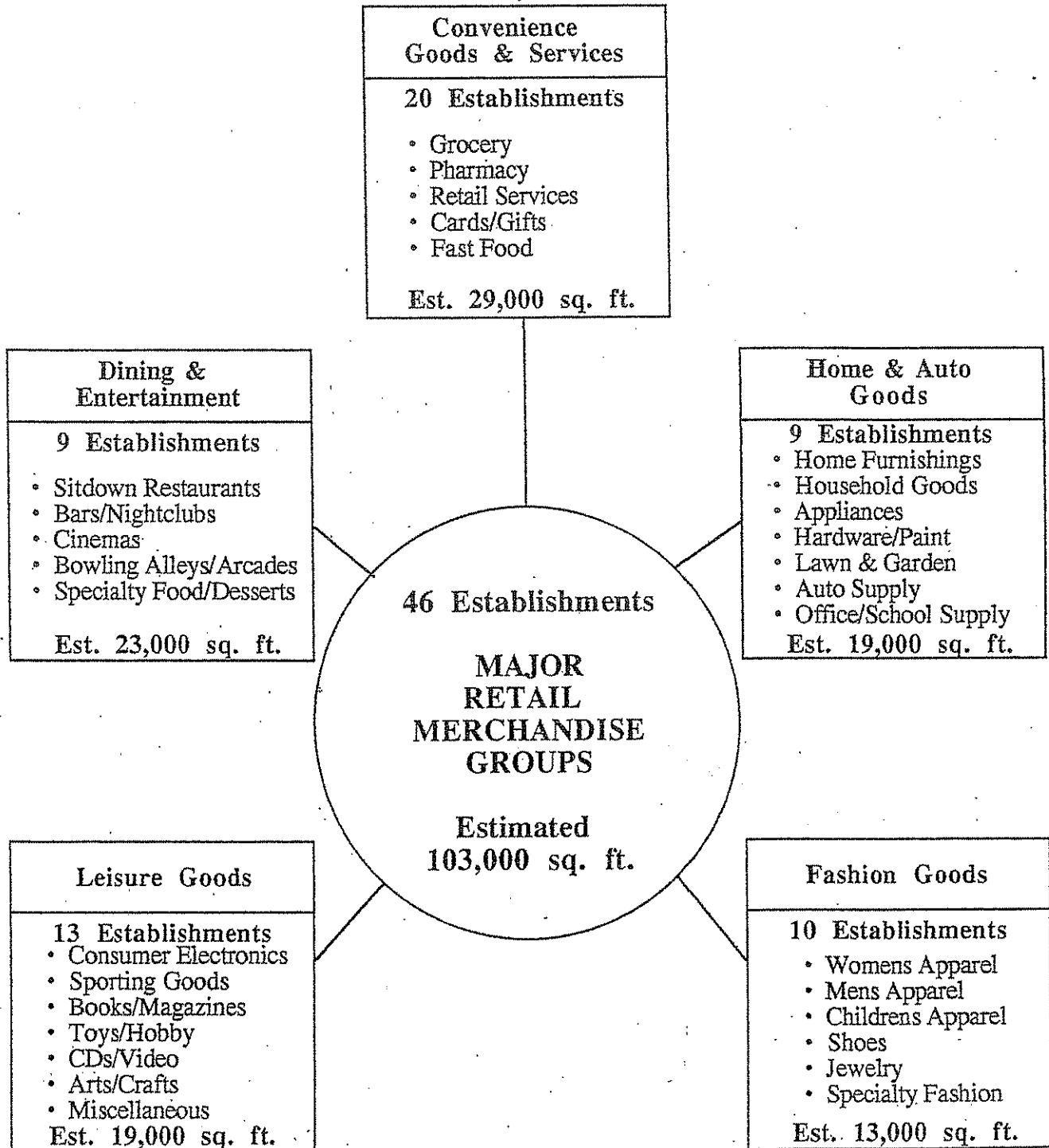
SOURCE: Greater Cleveland Growth Association

RETAIL SPENDING PATTERNS OBERLIN MARKET



SOURCE: Boulevard Strategies, U.S. Department of Labor, and CACI, Inc.

DOWNTOWN OBERLIN RETAIL MIX, MARCH 1998



SOURCE: Boulevard Strategies

NOACO Retail Analysis

Retail Analysis – Type of Business: Lorain County and Oberlin

Type of Business	Lorain County		Oberlin	
	Number	Percent	Number	Percent
Supermarket	27	0.7%	2	1.9%
Other Food	186	5.0%	4	3.8%
Food Service	501	13.6%	14	13.2%
Drugs	44	1.2%	1	0.9%
Other Convenience Goods	314	8.5%	13	12.3%
Convenience Services	366	9.9%	10	9.4%
Department Stores	6	0.2%		
Other General Merchandise	53	1.4%	6	5.7%
Clothing and Shoes	81	2.2%		
Other Shopping Goods	192	5.2%	3	2.8%
Furniture	147	4.0%	1	0.9%
New Auto Sales	38	1.0%		
Used Auto Sales	52	1.4%		
Auto Parts Sales	57	1.5%	1	0.9%
Auto Repair	204	5.5%	2	1.9%
Gas Stations	127	3.4%	5	4.7%
Enclosed Amusements	60	1.6%	2	1.9%
Social Halls	70	1.9%	1	0.9%
Hotels and Motels	27	0.7%	1	0.9%
Funeral Homes	29	0.8%	1	0.9%
Animal Hospitals	17	0.5%		
Training Schools	35	0.9%		
Business Services	22	0.6%		
Unidentified	125	3.4%	2	1.9%
Existing Vacant	404	10.9%	3	2.8%
Incomplete Vacant	12	0.3%		
Local Office	496	13.4%	34	32.1%
Total	3,692	100.0%	106	100.0%

Retail Analysis – Size of Establishment: Lorain County and Oberlin

Establishment Size (sq. ft.)	Lorain County		Oberlin	
	Number	Percent	Number	Percent
1 – 1,000 sq. ft.	509	13.8%	3	2.8%
1,001 – 2,000 sq. ft.	1,117	30.3%	20	18.9%
2,001 – 3,000 sq. ft.	631	17.1%	19	17.9%
3,001 – 4,000 sq. ft.	377	10.2%	5	4.7%
4,001 – 5,000 sq. ft.	256	6.9%	14	13.2%
5,001 – 6,000 sq. ft.	169	4.6%	8	7.5%
6,001 – 8,000 sq. ft.	167	4.5%	6	5.7%
8,001 – 10,000 sq. ft.	102	2.8%	5	4.7%
10,001 – 15,000 sq. ft.	148	4.0%	4	3.8%
15,001 – 20,000 sq. ft.	64	1.7%	4	3.8%
20,001 – 30,000 sq. ft.	55	1.5%	2	1.9%
30,001 – 40,000 sq. ft.	30	0.8%		
40,001 – 50,000 sq. ft.	10	0.3%		
50,001 – 60,000 sq. ft.	9	0.2%		
60,001 – 80,000 sq. ft.	8	0.2%		
80,001 – 100,000 sq. ft.	6	0.2%		
100,001 – 150,000 sq. ft.	6	0.2%		
150,001 – 200,000 sq. ft.	5	0.1%		
Data Not Available	23	0.6%	16	15.1%
Total	3,692	100.0%	106	100.0%

Average Size of Establishment by Type of Business: Lorain County and Oberlin

Type of Business	Average Size (sq. ft.)	
	Lorain County	Oberlin
Supermarket	24,992.63 sq. ft.	13,306.00 sq. ft.
Other Food	3,472.48 sq. ft.	11,518.25 sq. ft.
Food Service	2,691.12 sq. ft.	3,331.79 sq. ft.
Drugs	8,124.09 sq. ft.	5,300.00 sq. ft.
Other Convenience Goods	5,343.21 sq. ft.	3,499.54 sq. ft.
Convenience Services	1,842.88 sq. ft.	3,810.30 sq. ft.
Department Stores	115,936.83 sq. ft.	
Other General Merchandise	20,232.25 sq. ft.	6,701.83 sq. ft.
Clothing and Shoes	3,754.01 sq. ft.	
Other Shopping Goods	4,572.01 sq. ft.	3,157.33 sq. ft.
Furniture	5,992.80 sq. ft.	2,612.00 sq. ft.
New Auto Sales	17,215.24 sq. ft.	
Used Auto Sales	2,730.35 sq. ft.	
Auto Parts Sales	5,053.86 sq. ft.	4,464.00 sq. ft.
Auto Repair	4,429.09 sq. ft.	5,581.00 sq. ft.
Gas Stations	2,038.47 sq. ft.	2,163.40 sq. ft.
Enclosed Amusements	15,600.48 sq. ft.	7,922.50 sq. ft.
Social Halls	8,048.76 sq. ft.	1,896.00 sq. ft.
Hotels and Motels	27,163.67 sq. ft.	4,742.00 sq. ft.
Funeral Homes	7,236.28 sq. ft.	2,410.00 sq. ft.
Animal Hospitals	3,006.76 sq. ft.	
Training Schools	3,395.69 sq. ft.	
Business Services	1,750.14 sq. ft.	
Unidentified	6,551.56 sq. ft.	4,401.50 sq. ft.
Existing Vacant	3,920.90 sq. ft.	9,122.67 sq. ft.
Incomplete Vacant	4,602.75 sq. ft.	
Local Office	2,966.49 sq. ft.	3,339.56 sq. ft.
Average for All Businesses	4,885.40 sq. ft.	4,354.47 sq. ft.

Annual Retail Spending Estimates By Market Segment

Oberlin College Market (35% of total)	Estimated Total Annual Retail Expenditures	Estimated Downtown Annual Retail Sales	Downtown Market Share*
1. Students (2,900)	\$13,500,000.00	\$4,400,000.00	33%
2. Faculty/Staff Daytime Opening (900)	\$1,200,000.00	\$600,000.00	50%
3. Oberlin College (1.+2.)	\$14,700,000.00	\$5,000,000.00	34%
Oberlin Resident Market (33% of total)	Estimated Total Annual Retail Expenditures	Estimated Downtown Annual Retail Sales	Downtown Market Share*
4. Nonstudent Households, Zip Code 44074 (3,600)	\$43,200,000.00	\$4,800,000.00	11%
5. Oberlin Market (1.+4.)	\$57,900,000.00	\$9,800,000.00	16-17%
Visitor Market (32% of total)			
6. Tourists and Visitors	N/A	\$4,800,000.00	N/A
Total (3.+4.+6.)	N/A	\$14,400,000.00	N/A

Additional Retail Uses in Downtown Oberlin

MERCHANDISE Group/Line	PRIMARY TARGET MARKET(S)			
	Students	Employees	Residents	Visitors
CONVENIENCE GOODS & SERVICES				
•Health foods/herbs/ vitamins/juices	X		X	
•Ethnic/International/Deli/ Specialty Food	X	X		X
•Quick Copy/Printing	X	X		
•Perfume/Cosmetics/Bath Soaps/Gels	X	X	X	X
•Shoe Repair		X	X	
•Pharmacy	X	X		

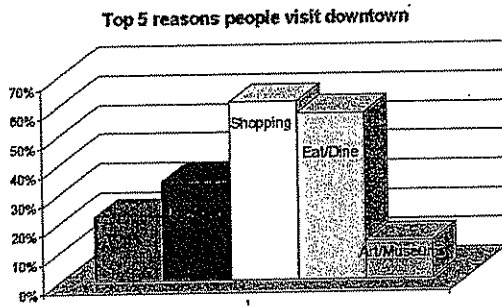
MERCHANDISE Group/Line	PRIMARY TARGET MARKET(S)			
	Students	Employees	Residents	Visitors
HOME GOODS				
•Discount Accessories/ Furnishings	X			
•More Antiques			X	X
•Household Decorations/ More Crafted Items			X	X
FASHION GOODS				
•Youth-Oriented Apparel/ Shoes/Used Jeans	X			X
•More Crafted Jewelry	X			X
•Children's Apparel/Shoes			X	
•Fashion Eyewear	X		X	

MERCHANDISE Group/Line	PRIMARY TARGET MARKET(S)			
	Students	Employees	Residents	Visitors
<u>LEISURE GOODS</u>				
•Used Compact Discs	X			X
•Used Books	X	X	X	X
•Musical Instruments -- New and Used	X			X
•Bicycles/Roller Blades/ Skate Boards	X		X	
•More Fine Art Galleries				X
•More Crafts/Pottery			X	X
•Computer Software	X	X		
<u>DINING & ENTERTAINMENT</u>				
•Fine Dining Restaurant w/Wine	X	X	X	X
•More Ethnic Restaurants	X	X	X	X
•Microbrewery		X	X	X
•Bagel Shop	X	X	X	X

DOWNTOWN CONSUMER SURVEY RESULTS

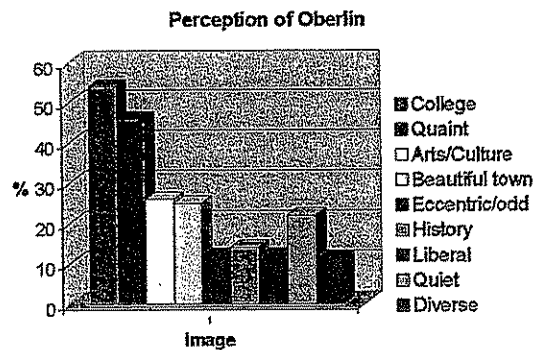
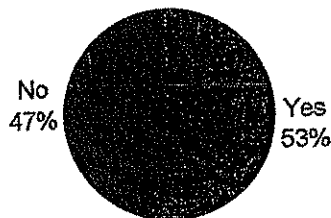
The following reflects the findings of the 1998 Main Street Connections study, the 2002 First Avenues, LLC study, and Main Street Oberlin, Inc.'s 2003 consumer study. Those studies and surveys all indicate that Downtown Oberlin's retail mix has not changed significantly over the recent past.

One question the survey included was "For what reasons have you visited downtown Oberlin in the past year?" The graph below indicates the five most frequently stated replies. As those surveyed were allowed multiple responses, answers do not total 100%.



Shopping and dining are the key reasons people visit downtown Oberlin, thus indicating that additional retail and restaurant are likely to succeed in the commercial district.

Went to restaurant on 7/11/2003



2009 OBERLIN CONSUMER "BUY SURVEY" RESULTS (COMMUNITY RESULTS)

Buy Survey- City of Oberlin		
What percent of your purchases do you make in Downtown Oberlin?		
Answer Options	Response Frequency	Response Count
almost 0%	12.9%	12
less than 25%	44.1%	41
25% - 50%	19.4%	18
About half	12.9%	12
50%-75%	6.5%	6
More than 75%	4.3%	4
Almost 100%	0.0%	0
<i>answered question</i>		93
<i>skipped question</i>		3

Buy Survey- City of Oberlin					
When you leave Oberlin other than for travel, why do you leave? (Rank in order, 1 being the most common reason.)					
Answer Options	1	2	3	4	Response Count
Dining	31	27	24	19	81
Recreation	16	21	31	12	80
Shopping	37	28	17	5	87
Other	26	8	5	12	49
Other (please specify)					43
<i>answered question</i>					94
<i>skipped question</i>					2

Buy Survey- City of Oberlin						
When you make purchases that are not from Downtown Oberlin stores, where do you make them? (Rank in order, 1 being the most common reason)						
Answer Options	1	2	3	4	5	Response Count
VS	1	9	15	21	9	55
online providers (amazon.com, etc.)	17	25	12	13	9	76
other stores outside of Oberlin	41	28	12	1	3	85
/almart	14	14	17	9	11	65
Other (please specify)	19	8	13	6	2	48
<i>answered question</i>						94
<i>skipped question</i>						2

2009 OBERLIN CONSUMER "BUY SURVEY" RESULTS

(COMMUNITY RESULTS CONTINUED)

Buy Survey- City of Oberlin		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by a lack of variety or selection?		
Answer Options	Response Frequency	Response Count
Not at all	4.3%	4
To some extent	25.8%	24
To a large extent	45.2%	42
This is a main motivation	24.7%	23
<i>answered question</i>		93
<i>skipped question</i>		3

Buy Survey- City of Oberlin		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by prices?		
Answer Options	Response Frequency	Response Count
Not at all	27.2%	25
To some extent	45.7%	42
To a large extent	16.3%	15
This is a main motivation	10.9%	10
<i>answered question</i>		92
<i>skipped question</i>		4

Buy Survey- City of Oberlin		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by hours of operation?		
Answer Options	Response Frequency	Response Count
Not at all	39.1%	36
To some extent	37.0%	34
To a large extent	16.3%	15
This is a main motivation	7.6%	7
<i>answered question</i>		92
<i>skipped question</i>		4

2009 OBERLIN CONSUMER "BUY SURVEY" RESULTS
(COMMUNITY RESULTS CONTINUED)

Buy Survey- City of Oberlin		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by dining or recreation options?		
Answer Options	Response Frequency	Response Count
Not at all	21.7%	20
To some extent	42.4%	39
To a large extent	29.3%	27
This is a main motivation	6.5%	6
<i>answered question</i>		92
<i>skipped question</i>		4

Buy Survey- City of Oberlin		
Are you satisfied with the dining options in Downtown Oberlin?		
Answer Options	Response Frequency	Response Count
Yes, I am satisfied.	42.2%	35
No, I am not satisfied.	57.8%	48
<i>answered question</i>		83
<i>skipped question</i>		13

Buy Survey- City of Oberlin		
Do you find that Downtown Oberlin satisfies your professional purchasing needs?		
Answer Options	Response Frequency	Response Count
Yes, it provides the needed materials.	47.4%	36
No, it does not provide the needed materials.	52.6%	40
<i>answered question</i>		76
<i>skipped question</i>		20

2009 OBERLIN CONSUMER "BUY SURVEY" RESULTS
(COLLEGE FACULTY/ STAFF RESULTS)

Buy Survey- Faculty/ Staff		
What percent of your purchases do you make in Downtown Oberlin?		
Answer Options	Response Frequency	Response Count
almost 0%	18.9%	45
less than 25%	48.7%	116
25% - 50%	14.7%	35
About half	8.4%	20
50%-75%	5.5%	13
More than 75%	2.9%	7
Almost 100%	0.8%	2
<i>answered question</i>		238
<i>skipped question</i>		1

Buy Survey- Faculty/ Staff					
When you leave Oberlin other than for travel, why do you leave? (Rank in order, 1 being the most common reason.)					
Answer Options	1	2	3	4	Response Count
Dining	25	78	51	26	180
Recreation	24	57	69	15	165
Shopping	23	44	22	9	198
Other	40	5	14	23	82
Other (please specify)					67
<i>answered question</i>					218
<i>skipped question</i>					21

Buy Survey- Faculty/ Staff					
When you make purchases that are not from Downtown Oberlin stores, where do you make them? (Rank in order, 1 being the most common reason) [Please note: IGA is not considered part of Downtown Oberlin]					
Answer Options	1	2	3	4	Response Count
CVS	6	18	35	33	92
Online providers (amazon.com, etc.)	30	61	54	20	165
Other stores outside of Oberlin	94	64	32	9	199
Walmart	36	27	25	32	120
Other	53	20	10	7	90
Other (please specify)					90
<i>answered question</i>					223
<i>skipped question</i>					16

**2009 OBERLIN CONSUMER "BUY SURVEY" RESULTS
(COLLEGE FACULTY/ STAFF RESULTS CONTINUED)**

Buy Survey- Faculty/ Staff		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by a lack of variety or selection?		
Answer Options	Response Frequency	Response Count
Not at all	5.4%	12
To some extent	35.3%	78
To a large extent	34.4%	76
This is a main motivation.	24.9%	55
<i>answered question</i>		221
<i>skipped question</i>		18

Buy Survey- Faculty/ Staff		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by prices?		
Answer Options	Response Frequency	Response Count
Not at all	25.8%	57
To some extent	43.4%	96
To a large extent	19.5%	43
This is a main motivation	11.3%	25
<i>answered question</i>		221
<i>skipped question</i>		18

Buy Survey- Faculty/ Staff		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by hours of operation?		
Answer Options	Response Frequency	Response Count
Not at all	52.9%	117
To some extent	36.2%	80
To a large extent	9.0%	20
This is a main motivation	1.8%	4
<i>answered question</i>		221
<i>skipped question</i>		18

2009 OBERLIN CONSUMER "BUY SURVEY" RESULTS

(COLLEGE FACULTY/ STAFF RESULTS CONTINUED)

Buy Survey- Faculty/ Staff		
To what extent are your purchases from vendors other than Downtown Oberlin motivated by dining or recreation options?		
Answer Options	Response Frequency	Response Count
Not at all	18.1%	40
To some extent	47.1%	104
To a large extent	27.1%	60
This is a main motivation	7.7%	17
<i>answered question</i>		221
<i>skipped question</i>		18

Buy Survey- Faculty/ Staff		
Which of the following community activities in Downtown Oberlin do you take advantage of? (Select as many that apply)		
Answer Options	Response Frequency	Response Count
Art classes and workshops at FAVA	12.2%	22
Tours and special lectures by the Oberlin Heritage	9.4%	17
Oberlin Public Library & The Bridge	72.9%	132
Downtown Oberlin events such as the Arrival of Santa,	63.0%	114
Weekly discounts at Agave, The Feve, or The Apollo	48.1%	87
Other (please specify)	19.9%	36
<i>answered question</i>		181
<i>skipped question</i>		58

Buy Survey- Faculty/ Staff		
Do you find that Downtown Oberlin satisfies your professional purchasing needs?		
Answer Options	Response Frequency	Response Count
Yes, it provides the needed materials.	39.8%	74
No, it does not provide the needed materials.	60.2%	112
<i>answered question</i>		186
<i>skipped question</i>		53