

Retail Reflections

A supplemental report to the Hoyle, Tanner & Associates Re-Thinking Main Street Report

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THE SETTING

On November 3, 2010, during the final public presentation of the Re-Thinking Main Street Project at Red River Theatres, several retail store owners stood to read the names of 75 businesses opposed to the Community Consensus Design. These names appeared on a petition which circulated the downtown area just days in advance. Though the Re-Thinking Main Street Task Force's efforts over the previous 11-months to engage as many people in the discussion as possible, several downtown merchants felt their voice was not heard.

While the petition and its 75 signatures have become the highlight of the November 3rd public meeting, there are other data points that can be extracted. Most notably, of the forty-two unique and informed businesses that attended at least one presentation to learn about the project prior to November 3rd:

- 25 did not sign the petition (59.5%)
- 13 did sign the petition (30.1%)
- 3 of the 13 business owners reported confidentially to signing only to support their fellow merchants, and were not in opposition to the Community Consensus Design (66.7% versus 23.8%)
- 4 people signing the petition were not the decision maker at the business (9.5% invalid respondent)

Despite the statistical conclusions that could be extracted from the petition, further evaluation down this vein would not be productive. Therefore, at the request of the majority of the petition circulators, the Task Force paused to reflect, which we were told was the true intent of the petition. The Task Force also recognized the opportunity to welcome several new voices to the discussion in an effort to better understand the concerns of our downtown retailers. Undeniably, questions lingered and there were hopes for clarity with regards to:

1. Parking – the Community Consensus Design incorporated the greatest number of safety enhancements for pedestrians. For these concerned retailers, it translated to a potential loss of 34 parking spaces in the North Main section and a gain of 14 spaces along South Main. The loss of parking reverberated and attempts to convey the proposed design was flexible failed.



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- 2. Construction Impacts providing a timeline for construction is impossible at this stage, however the Task Force carefully selected a firm with experience working in a downtown historic setting where construction in a commercial district required sensitivity. It was recognized by the Task Force as being significant prior to and while gathering the public's input.
- 3. Empirical Data proof that streetscape improvement projects have positive outcomes on generating increased sales for retail businesses along with an expanded tax base.

The results of our further evaluations, discussions and outreach with downtown merchants are summarized below. Of note; data points regarding involvement are based solely on the Re-Thinking Main Street process and our further outreach efforts. Therefore, if a business was inclined only to sign the petition and nothing else, the business is not considered a participant.

OVERWHELMED

After the Concord Monitor ran a story on January 20, 2010 announcing the Task Force's hopes that improvements along Concord's Main Street could invigorate positive economic gains for the City, residents across the state perked up, listened and weighed in. All along our intent was to create NH's Main Street; something every resident of the state could be proud of and that would represent of all the great things New Hampshire has to offer. Highlighting downtown's historical significance for Concord, as well as the state and country, was primary. The question was simple; if you could rebuild Main Street from building edge-to-building edge, what would you do?

By mid-February, during initial public presentations, residents across the state spoke up; from Manchester to Milford, Nashua to New London, Hillsborough to Hinsdale, and Pittsfield to Pittsburg. All gave voice to their hopes and hates about Concord's Main Street and this project.

Once public outreach efforts garnered attendance at various presentations exceeding a combined one thousand people, it was proudly announced. In fact, by the time Focus Group Sessions in late August –early September 2010 completed, the number exceeded



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thirteen hundred, but for project recognition purposes "Over 1,000 people have spoken" remained. Hearing this it is easy to understand how some downtown retailers may have felt overwhelmed. They are but 155 strong.

Some downtown retailers expressed frustrated that a project which would impact their livelihood was being decided by the masses. In some cases this frustration included a perceived lack of participation by fellow retailers. Prior to the November 3rd meeting there had been sixteen presentations for which downtown retailers could have openly attended. Main Street Concord's website relayed up-to-date information related to the project, available for viewing at one's convenience, yet only forty-two unique retail businesses had taken part in the discussions. This is evidenced by attendance sheets, comment cards, notes, email and phone conversations, all of which have been categorized and documented by the Hoyle Tanner team, Main Street Concord and Concord 2020.

Recognizing the importance of merchant involvement, Main Street Concord and Concord 2020 responded by having both organizations' executive directors visit first floor businesses throughout the district. One hundred and fifty display stands with flyers announcing upcoming presentations were left on counters of retail businesses to encourage employees, customers and the general public to attend. Four full workdays, once in February and again in June for a total of eight days, were dedicated to talking one-on-one with business owners, managers, staff, etc. While visits were specifically conducted to encourage business owners to attend any of the presentations, several visits included pertinent observations regarding existing conditions out the business owner's front door. The directors listened, took notes and relayed this vital information back to the Hoyle Tanner team, who in turn incorporated those observations into the evaluations.

Despite this level of outreach to ensure adequate inclusion, several merchants felt their opinions, ideas, observations and preferences were not incorporated. Though in truth, the final result of the Community Consensus Design is punctuated by input from downtown retailers. For example:

A retail business in the block along North Main Street and Depot Street was
adamant that the 3-lane recommendation would not work at the Pleasant Street
intersection. Result – the Hoyle Tanner team concurred and made recommendations
to taper the lane configuration out to five lanes through the intersection. Though



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- regularly referenced as "the three lane configuration," the entire length of Main Street does not remain so from project end-to-project end. It tapers and expands as necessary for facilitating adequate traffic flow.
- A retail business in the block along South Main from Pleasant to Fayette noted the
 crosswalk in front of Capital Commons is misplaced. Result the Hoyle Tanner
 team observed the high volume of jaywalkers crossing by Gibson's and Concord
 Cooperative Market and noted the proximity of the current crosswalk to the
 Pleasant Street intersection. Hoyle Tanner has recommended the crosswalk be
 moved further south, away from the intersection, and a second crossing be added at
 Hills Avenue.
- A retail business in the block across from the State House noted while buses are
 boarding passengers, the buses block the pedestrian crosswalk, in front of
 Pompanoosuc Mills. This creates a dangerous condition as drivers cannot see
 pedestrians who are hidden by the buses. Result the Hoyle Tanner team
 recommends moving the crosswalk to the corner of Capitol and North Main at the
 former Rare Essentials. This will allow multiple buses to queue along the sidewalk
 in front of Eagle Hotel and is consistent with the recommendations of the 2009/2010
 Concord Area Transit Comprehensive Study.
- Several South Main Street businesses questioned why angled parking couldn't be
 utilized now to increase on-street parking. Result the Hoyle Tanner team agreed
 additional on-street parking could slow traffic and accommodate South Main
 businesses, particularly when performances were in session at the Capitol Center for
 the Arts. Result this is how 14 spaces are gained along South Main Street.
- The existing condition of the sidewalks along South Main Street reverberated strongly with the adjacent businesses and the customers that walk along them. The narrowness of the sidewalk and state of the westerly double step curb being the most mentioned issues. Result if Major Improvements to Main Street are not undertaken, these conditions will not change.

Seeking to better understand the concerns of our downtown merchants, the executive directors of Main Street Concord and Concord 2020, along with a representative of City Engineering Division and the Project Manager from the Hoyle Tanner team held two private merchant meetings on November 30th, 2010. In cooperation with the petition circulators and the Merchant Roundtable, a vast invitation to the retail business community



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was extended and yielded eight new voices to the conversation. The goal was to further define the best ways to conduct outreach efforts.

ADDRESSING THE ISSUES

1. PARKING

The greatest hindrance to retail sales in downtown Concord today is reported to be parking. Even merchants are divided as to whether this is a true statement or a perception. Concord should be promoting all the great businesses and opportunities available in downtown, but instead, potential customers hear about how challenging parking is, whether on Main Street or in the garages. It comes from the newspaper, customers, downtown workers, state legislators and merchants.

Hoyle Tanner Review and Evaluation:

On-street, downtown parking is not functioning at capacity. The inventory includes 860 on-street metered/kiosk spaces and 1,200 spaces in garages. The City's ad hoc parking committee found that the typical metered space was occupied for an average of only 3.5 hours weekdays. Prime spaces along Main Street are in demand, but the Re-Thinking Main Street project measured one-third of the parking space occupants are not shoppers to local retailers. They are visitors to the other service and professional businesses in the downtown. Alas, valuable on-street spaces are occupied by downtown merchants and their employees. In summary, the problems and perceptions perpetuate themselves.

The Re-Thinking Main Street Task Force conducted Intercept Surveys with approximately 300 patrons of the downtown. Parking was one of the resonating topics. Here are the findings:

From the weekend patron:

A significant number of people mentioned parking as an issue in the downtown area but unpredictably the problem was not finding a place to park or paying for parking. The problem was in the stressful mechanics. Respondents cited circling the block to find a suitable space. "Suitable" was defined as not next to an SUV, minivan or truck. People expressed fear and frustration about "inching their way" or "blindly backing out" onto



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Main Street. With nearly 60% of the people interviewed being from out-of-town, the interviewers noted a number of people confused about the meters/kiosks. Kiosks were being installed in downtown, but not become operational at the time of the surveying. Although proximity to the intended destination was mentioned, when asked, more people revealed they intended to visit more than one business, so a close parking spot was not important.

From the weekday patron:

Nearly 30% of respondents mentioned parking as an issue in the downtown. The weekday visitor was more concerned first, with finding an available on-street spot and secondly, in front of the intended destination. Concerns about enforcement, cost of parking, fines or just the existence of meters were also cited. The experience and stress of backing into traffic was also mentioned but not to the degree of the Saturday visitor.

For both weekend and weekday patrons, parking was cited as what is liked least about downtown.

From store owners:

Retailers who are apprehensive about Re-Thinking Main Street primarily cite concern about merchant parking. Discussions ranged from concern over fellow merchants and downtown employees parking on Main Street to the loss of free parking for merchants on Storrs Street. Furthermore, some felt parking for merchants should be free because they are already paying rent for their business location. Others concluded downtown merchants should pay "no more than \$200.00 a year." Still others suggested the City should identify an area in close proximity to downtown for merchants to park for free and be able to board a bus or trolley to take them to the district. There was no mention of whether the bus trip would be a paid or free round trip boarding.

Retailers who are generally in support of Re-Thinking Main Street share that any improvement to the parking for customers is an improvement for downtown retailers. One merchant noted, "If we know we can make it better and safer, why wouldn't we? Don't we have an obligation to our customers? Aren't we in the business of customer service?"



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Still other retailers felt the findings of the Intercept Survey were off the mark. Their personal observations over the years leaned towards the belief that a majority of comments from customers about the lack of parking and the issues of proximity to the intended destination was the truer statement. Other retailer observations included customer complaints about parking enforcement outweighing complaints about pulling out of a parking space.

2. CONSTRUCTION IMPACTS

At the November 30th merchant meeting the Re-Thinking Main Street Task Force offered downtown retailers an opportunity to travel to Littleton, NH to speak one-on-one with stakeholders of that community. The invitation was extended to better understand how construction impacts downtown stakeholders.

Littleton had completed Phase I of a re-construction project just as the economy was beginning to down cycle. The work impacted Littleton's Main Street throughout 2009, and into the spring of 2010.

More than twenty-five merchants expressed interest in attending, though turnout was much lower than expected and although only five retail business representatives joined members of the Task Force, it was most productive. The smaller group allowed for indepth discussions with the hosts in Littleton.

Hosts included:

Charles Connell, Town Manager of Littleton
Chad Sterns, Executive Director of Littleton's Chamber of Commerce
Greg Bakos, Project Manager from Vanesse Hangen and Brustlin, Inc (VHB)
Jack Eames, downtown property owner and owner/operator of Jax Jr Cinema
Jim Alden, owner of Chutter's Candy Shop
Wayne Morello, property owner and owner of Island Oasis Restaurant

Selection of the people best suited to meet with Concord retailers was left entirely to the Littleton Chamber of Commerce. Mr. Sterns was a valuable asset to the communication



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piece of the Littleton Project and surmised the concerns our merchants would want to investigate would echo those his constituents contemplated as well. Before embarking on their project, Littleton's merchants travelled to North Conway for a similar exploration and so our adventure was familiar to the stakeholders in Littleton.

General Observations and Details about Littleton provided by one of the retailer attendees, with added detail from the Re-Thinking Main Street Task Force members:

- Littleton faced a water and sewer utility replacement/ infrastructure project regardless of the streetscape improvement, construction was going to happen.
- Main Street runs parallel to the Ammonoosuc River and drainage along Main Street
 was a serious issue as the downtown flooded during the heavy rains in 2004 and the
 Mother's Day floods of 2006. The Littleton Diner displays photographs of canoes
 traversing down Main Street. The water was deep enough not to allow traditional
 vehicles on the roadway.
- Funding for the Littleton Project was two-fold. Through a Federal Highway Administration TCSP Grant, the streetscape portion was funded at 100-percent. The utility replacement portion came about through a package of funding sources administered through the NHDOT.
- Management of construction was initially overseen by the Town of Littleton, however personnel at the Town Offices shifted the project leadership to NHDOT as Main Street is Route 302. Project Leader, Greg Bakos from Vanesse Hangen and Brustlin, Inc, hired a Communications Specialist to keep the community informed.
- Littleton's project was 10 years in the making and half the length of Concord's downtown project.
- Since the project was delayed for so long, surface items like sidewalks and curbing had been piecemeal "repaired" since they were always going to do the major project the next year. It was a mess and a hazard to pedestrians. A pedestrian was struck by a car and killed on Main Street and became the impetus for making the project happen.
- There were over 70 trees in the original design. No trees were planted in the final phase and no benches were installed for budget reasons. In all instances, the people that we met regretted not including some trees and a few benches. They even told us of new technology that allows trees to survive better in downtown environments. They do plan on hanging flower pots from the street lights at some point and are working to raise private donations to purchase trees and benches.



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- The final designs were conceived only after several business people suggested that
 this would be the time to make over Main Street and update some of the surface
 appeal such as better sidewalks, trees, benches, streetlights and improved / safer
 crosswalks.
- The final design included shifting the travel lanes to improve sidewalk width on one side of the road that had varying widths. All parking is parallel. They lost 6 parking spaces due to DOT laws requiring some 20 feet of space between crosswalks and parking. The people we spoke with seemed to have resigned the need to correct the parking deficiencies in order to protect the pedestrians.
- The project was completed in early summer of 2010. Merchants did take advantage
 of sidewalk areas to show products on sale, etc. The added space also came in handy
 for the Art Shows and Summer Fest activities. Property owners took advantage of
 façade improvements, but most merchants did not make improvements to their
 window displays.
- Two businesses closed after the project completed. The business owners blame the project but the people who we spoke to all agreed that the stores were in serious financial trouble before the project began.
- There is never a good time to do this. Get it started and get it over with. Delays do not help in the end. Most businesses wanted changes in downtown but with the economy faltering, several wanted to delay beyond the recession. The project started in spring 2009 and went through the summer. The busy season for shops. The consensus now is that it was not as bad as they had envisioned.
- Their view is that the contractor was excellent and listened to their concerns. Merchants must be involved every day. Communications is the key to success. Don't call the city when a walk over to the construction trailer works better and saves time.
- Positive attitudes helped everyone get through the tough times. Especially with customers listening. Creative ads helped get customers downtown.
- Littleton created a weekly update meeting schedule with the contractor. A web site with news was created. They created a moose character called Marty the Moose using his image on everything, and designated the construction project the Little Dig. Littleton even had 6-foot life sized cutouts of Marty made to use at the construction site as a promotion. Kids were coming downtown to get their pictures taken with "Marty the Moose". A live web cam of downtown (also used by WMUR weather) allowed people to see what was going on and check on traffic congestion.



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- After 2 weeks of construction, the Main Street converted to one lane with traffic lights to control traffic. They had been promised that this would not happen. Advice: things change, roll with the punches and adjust, adjust, adjust. Yelling at the flag person did not reduce the project by a single day.
- Hours of operation were 7:00 a.m. to 7:00 p.m. This allowed more efficient work with less time to set up and break down. No construction on Fridays and Saturdays. Sundays and nights were used if necessary to stay on schedule. Only a few stores were open on Sundays. Stores did not change their hours during the project.
- Property owners helped by not increasing rents for retailers.
- Get assurances in writing to cover any losses. A sewer (or sanitary sewer) pipe break went unresolved for the recovery costs of damages for months since it was deemed "no one's fault." The business owner lost over \$20,000 in inventory plus a loss of business but survived the dig.
- Bottom line is that everyone worries about themselves. Getting consensus on doing a large project is highly unlikely. After the chaos is over, everyone is happy for a lot of different reasons.
- Business owners talked to the construction crew chiefs and negotiated real time changes in the schedule to reduce impacts on business activities.
- Construction crews were aware of issues and helped out when they could. Helping people cross the street, fixing a flat tire, giving directions to parking areas, etc.

Reflections from Concord merchants:

Together executive directors of Main Street Concord and Concord 2020 met with individual retail merchants after the trip to Littleton to talk about Littleton's project and gather reflective thoughts. Impressions of Re-Thinking Main Street were shared as well. Below are the commonalities in these observations. With such a small contingent, confidentiality was promised.

Overall Impression of Littleton's Project:

Amazed at the pride everyone had for their downtown, yet it was so stark and bare.
 Now (retailer) can see how the trees and benches would have softened the concrete and asphalt. Now can see how even the little bit of trees in Concord has made a big difference.



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- As difficult as construction was for Littleton, at the end of the day, they are so happy with their downtown. Pride is something we don't have in Concord.
- Very impressed that every person they spoke to in Littleton would have done the project again, knowing what they know now. Especially the business that had \$40,000 worth of damage to their property. (A break in a sewer line dumped raw sewage into the basement of one retail business causing \$20,000 in lost inventory and \$20,000 worth of damage to the property).
- The message (retailer) heard from everyone in Littleton was "do it sooner, rather than later" and don't drop the things you don't think are important like trees and benches. You only have one shot.
- Wishes more retailers could have come on the trip as it was refreshing to then look at the Main Street Project with fresh eyes.

Communication:

- Communications Specialist is needed for Concord. The weekly meetings, webcam, these are great ideas Concord can use.
- The importance of communication during construction is critical. Perhaps Concord should do this over one season rather than two. Have a dedicated website use tweets Facebook updates, etc.
- Liked how Littleton utilized a communications specialist. Thought that in Concord there would also need to have parameters or rules of engagement for our merchants, as advised by Littleton.

Parking in Littleton:

- All said they would do this project again, despite the loss of parking. Littleton lost six spaces and uses only parallel parking on Main Street.
- Littleton's employee parking appreciation and reward program was well received.
 The employees provided their license plate number to employers, who conducted
 weekly drawings for parking off Main Street in the municipal lots thus keeping onstreet parking for customers.



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Construction in Littleton:

- Littleton was smart to use a flexible work schedule of 4-days a week and working around important sales and events in the downtown. Concord could use this same approach but also create events around the construction.
- How we (retailers) address construction will translate to the customers. If we have a
 positive outlook like Littleton did (The Little Dig and Marty the Moose as a mascot)
 so will our customers. If we are only talking about the negative stuff, that's what the
 customers will hear.

Overall Impression of Concord's Project:

- Re-Thinking Main Street Team needs to sell the idea of economic development again. It has fallen through the cracks.
- The merchants that are opposed have reduced this to a beautification project Re-Thinking Main Street Team needs to do a better job of focusing on the economic development of downtown.
- If this is about economics, (retailer) doesn't see it.
- Concord's retailers are not recognizing the long term economic benefits.
- Most impressed that the Re-Thinking Main Street Team didn't make the trip a sales pitch for Concord.

Parking in Concord:

- Resolve the parking problems.
- Merchants need to stop parking on Main Street.
- Parking should stop being the driving force of the conversation. Change the discussion.

Universal Access in Downtown Concord:

- The double curb needs to go. If that's the only thing we change on the sidewalk, get
- Universal Access is so important. If we can't achieve this we shouldn't do the project.
- (Retailer) is more sensitive to ADA issues downtown than others. We can do better in Concord.
- Heat the sidewalks. The downtown would then be accessible year-round.



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Concord - A Destination:

- If Concord is a destination, we can capitalize on repeat customers and develop an expanded customer base.
- Concord can concentrate on becoming an after 5:00 destination, even if it is in small sections, then we can grow our selling day.
- Why isn't Concord doing more to attract tourists?

The thoughts above represent those shared by two or more of the five merchants attending the Littleton trip. Singular thoughts are shared at the end of this supplement.

3. EMPIRICAL DATA

The Re-Thinking Main Street Task Force provided retailers nine different studies outlining economic benefits of streetscape improvement projects. A summarizing page of this project was also shared. With the holiday season looming, it was recommended retailers read at their leisure, email or call with questions, and we would regroup after the holidays. In order to share thoughts with the larger groups, retailers were encouraged to use an "Ask the Expert" link on the Main Street Concord website, so that questions and responses would be posted for public viewing and to cultivate greater discussion.

These articles remain available on the Main Street Concord website:

- Complete Streets Spark Economic Revitalization
- Economic Effects of Traffic Calming
- El Cajon's Road Diet A Case Study
- How Your Community Can Thrive Even in Tough Times
- Road Diets Good for Business
- Urban Street Trees 22 Benefits
- Walk to Money
- What Main Street Can Learn From the Mall

One article was in handout form only:

• The Successful Few: Healthy Downtowns of Small Metropolitan Regions

Two additional articles were added to the site after November 30th:



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- Placemaking and Economic Development National Association of Realtors Quarterly Publication called On Common Ground
- Mid-size Cities Re-invent Their Center, Boston Globe

FURTHER OUTREACH EFFORTS

Members of the Re-Thinking Main Street Task Force reconvened after the Littleton Trip to reflect on all the further outreach efforts with downtown retailers. Through a process of self evaluation, these were the take-aways:

- 1. The goal of economic development was lost and this project had translated solely to a streetscape improvement/beautification project. It was recognized that only those people who had attended all of the Hoyle Tanner public meetings would have seen the full gamut of the economic evaluation. This data was presented in stages as each evaluation method occurred. There was not a single presentation that summarized the totality of the findings. In response, at the final merchant meeting on February 22, 2011 all the economic data was presented from start to finish:
 - Concord's Demographic Analysis
 - Intercept Survey findings
 - Focus Group results
 - Case Studies for Keene and Manchester
 - Re-Thinking Main Street trip to Keene
 - Merchant fieldtrip to Littleton
 - Summary of discussions from the January Property Owners Breakfast
 - Information regarding possible funding sources.
 - Summary of areas of consensus developed through a total of 28 public presentations spanning a 10-month timeframe.
 - A block-by-block review of the final Community Consensus Design and how it met the criteria of consensus defined by the community.
 - A highlight of the sections in the Community Consensus Design that showed the portions of the recommendations brought to the team by downtown retailers.
 - An outline of next steps.



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The presentation ended with applause from the merchants. Regrettably, through all of the extended efforts, the Re-Thinking Main Street Task Force had still only garnered eight new voices to the discussion, for a total of 50 unique businesses of the 155.

- 2. Polarity had developed along Main Street and a division of opinions was developing amongst downtown businesses. Those that are in favor of making major improvements are being silenced by some peers with opposing views. Although shared early that further outreach would not change the Community Consensus Design and that this additional outreach was, as directed by the petition circulators, a means to take pause, some retailers felt, and still feel, they hold sway and can reverse the community preference. The Task Force did as originally directed, to provide retailers additional information regarding parking, construction impacts, and empirical data and hopefully bring more retailers to the table.
- 3. A second point of polarity also emanated from the most vocally opposed retailers. Their thoughts are in direct conflict with the information gathered through the Intercept Surveys and Focus Groups. Of particular concern is the impression some retailers have that the knowledge they garner from their own clientele is then the same opinion of all customers of downtown. This is not the case, rather in fact, it is in complete opposition. When the team has attempted to clarify the findings, intent is then to discredit the Hoyle Tanner Team and members of the Re-Thinking Main Street Task Force. On occasion these attempts have led to verbal attacks on the team's professionalism, work ethic, personalities and motivations to advance this project.
- 4. The Re-Thinking Main Street Task Force revealed the studies provided contained excellent information as to the economic gains for the communities, yielding tens of millions of dollars in tax base expansion. However, information pertinent to financial benefits to retailers was minimal. As such, the Task Force agreed to catalog a before and after snapshot relative to retail sales.

There is an opportunity to live up to Concord's status as the State Capital by providing a formalized process specifically designed to address the needs of



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merchants throughout this project. This type of targeted data collection can be cataloged and used as a guide as the project progresses. The information can be retained and referenced through construction to ensure the concerns of retailers are being addressed.

It is not necessary for all retailers to participate, but for accuracy in the decision making process, the Task Force sought to identify the "Core 40": forty retailers willing to remain engaged throughout the project. The Core 40 is determined by the statistical mean needed to give the Team a 99% confidence level in decision making. With a standard deviation of 5, the confidence interval is ±1.03.

Funding for the initial stage of the Re-Thinking Main Street Project was provided by Concord 2020 through a Transportation Community and System Preservation (TCSP) Grant and although this further outreach is being funded entirely with non-federal funds through Concord 2020, developing guiding documents for future federal highway projects was one of the original goals of the TCSP funds. This further evaluation can serve as the basis for a guide.

Development of the baseline and administration of the survey came through the expertise of Murdoch Social Capital. Together with Task Force members, a retail survey was developed and distributed over the course of a 4-week time period in March and April, 2011. Distribution was facilitated in whole by Murdoch Social Capital.

The task was to map out the baseline economic health of our downtown retailers and identify participants for the Core 40. Using the economic assessment from the Re-Thinking Main Street evaluation

Downtown is healthy, but fragile

The Task Force developed a scale of economic health. A score of five indicates a healthy business; a score of one indicate a fragile business. Expectations were delightfully exceeded as 61 businesses agreed to participate as Core 40 members.



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Repeatedly, the Re-Thinking Main Street Task Force was bombarded by requests to follow up one-on-one with the downtown merchants to gage opinions on the project. To avoid any perceived influence by the Task Force, and to diffuse any polarity between the Task Force and downtown merchants, Murdoch Social Capital included three open ended questions:

A. The first question was actually two-fold.

How familiar with the project are you and what is your general sense of the potential impacts of this project on your business and Main Street in general?

The Task Force anticipated both positive and negative responses, over a wide range of topics. This included a short lead in question related to project familiarity.

B. What do you hope will be the greatest benefit your business will gain from this project?

The Task Force was hopeful to see responses highlighting economic benefits for retail business, however responses could vary significantly.

C. Any other thoughts?

This question would gather the greatest and most honest concerns from retailers. They could answer anything.

The complete survey and findings are outlined in Appendix A but the highlights are provided here:

- The extended outreach through Murdoch Social Capital did garner 35 new voices to the conversation for a total of 85 unique businesses, a sum total of 55% of the total 155 retail population.
- With regard to the Core 40, 61 businesses agreed to participate, allowing the Task Force a core constituency of retail businesses to turn to for advice and guidance.
- The Hoyle Tanner Team's assessment that Downtown is Fragile but Healthy proved accurate. Decision makers currently rank their businesses as:



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- 1. Increasing or healthy (4's through 5's) was reported by more than 50% of downtown's retail businesses;
- 2. Another 24% report business is either flat or just a bit stronger (3's and 3.5's);
- 3. Business is decreasing for 16% of downtown retailers (2's and 2.5's);
- 4. 7% consider themselves to be fragile (1's and 1.5).
- The question regarding the general sense of project impacts yielded varying results, the most significant impact being:
 - Loss of parking at 19%;
 - 2. Length of construction phase ranked second highest at 16%;
 - 3. "Positive Overall" equaled "Anti-three lanes" at 14%.
- Of the greatest benefits, economic gains did resonate with 41% citing "More Foot Traffic" and "More Business"; while 26% shared there would be no benefits.
- Finally the response indicated as the highest on the mind of retailers is frustration over both the current parking conditions on Main Street and future parking plans proposed under Re-Thinking Main Street.

At the start of the Supplemental Report, it was shared that the Re-Thinking Main Street Task Force could only account for 42 unique business participants prior to the November 3rd meeting. Through the further outreach efforts up to February 22, 2011 the number was increased to a total of 50 merchant voices. Additional outreach, through Murdoch Social Capital, yielded a total participation to the Re-Thinking Main Street process by 96 merchants (61.9%). And although 31 responded frankly they knew little-to-nothing about the project, 61 downtown retailers have committed to providing guidance as recommendations of the Community Consensus Design are brought to fruition.





Report on Follow-up Survey of Decision Makers at Downtown Businesses (March/April 2011)

Throughout March and into April, decision makers at (155) downtown Concord businesses were asked to participate in an independently conducted 4-question survey on the Re-Thinking Main Street Project. Whenever amenable for the business, surveys were conducted in person. Multiple attempts were made to connect with businesses, and when requested, a printed version of the survey was delivered. Attached to the survey were (4) options for completion, including phoning my direct line to schedule a meeting time, conducting survey via phone, completing hard copy and calling to have picked up, or sending feedback via e-mail. The goal was to maximize responses by making the process as simple as possible.

Survey interview completion times ranged widely from 2 minutes (quite rare) to more than an hour. Many decision makers had a bounty of passionate ideas that sprang forth once their pump was primed by the initial (4) questions. Without exception, despite very strong feelings both in support of and opposition to the RTMS project, merchants were gracious and open with their experiences, thoughts, fears, and hopes. It was a pleasure to spend time with so many new and familiar downtown faces.

Overall, 55% of downtown businesses participated in the survey. Business closure/consolidation, business not located where listed, and declining to participate combined to account for another 3% of the original list of (155). The remaining 41% of businesses did not outright decline to participate, but have not provided feedback, with some marking it clear they are not interested in the process at this time.

Following is analysis of each survey question. Please do not hesitate to contact me with any questions.

Kim Murdoch May 12, 2011



bridging communities. Connecting people.

Question #1: Would you be willing to participate on the Core 40?

"Core 40": Forty retailers willing to remain engaged throughout the Re-Thinking Main Street project. The Re-Thinking Main Street Task Force will periodically reach out to all retailers for input or feedback, to

which any and all can respond, but the Core 40 commit to responding.

Core 40 Feedback	#	%
Surveys completed:	85	
Core 40: Need more information	4	5%
Core 40: YES	61	72%
Core 40: NO	19	22%
Core 40: Not answered (Hair Biz)	1	1%
Total:	85	100%

The (61) Inaugural Participants in the "Core 40":

A Jewelers Workshop

A. Little Confections

Anaconda Tattoo and Piercing Arrows & Embers Tattoo

Bead It!

Bona fide Tattoo

Bravo

Bristol Watchmaker Britches of Concord Butter's Fine Food & Wine

Capitol Copy Capitol Craftsman

Capitol Paint & Wallpaper

Caring Gifts

Castro's Back Room Christian Michael Salon

Christian Science Reading Room

Ciborowski Associates Concord Antique Gallery Concord Camera Store Concord Cooperative Market

Constantly Pizza

CVS

Endicott Furniture
Gibson's Book Store
Gifford's Barber Shop
Hermanos Cocina Mexicana

Imagination Village

Ink Spot Just Be

L & B Tailoring and Alterations

Let's Dance

Little River Oriental Rugs

Lost Your Shirt Lotions 'n Potions McGowan Fine Art

Merrimack County Savings Bank

New Hampshire Bindery

New to You

Outfitters Thrift Store Prescription Center Pitchfork Records

Puppy Love

Red River Theatres Revolution Cyclery Sharing Yoga Siam Orchid

Simply Birkenstock Speer's Fine Jewelry

Starbellies Children's Clothing

Susana's Sewing Taylored Interiors The Barley House

The Works

Things Are Cooking

Time 4 Change Embroidery

True Brew Barista United Shoe Repair

UPS Store

Your Home Your World Bra Fitters

Zoe & Co. Professional



Question #2:

The overall assessment of downtown's economic state is that it is healthy, but fragile. On a scale of 5 to 1 where do you rank your business today?

- 5 Business is healthy
- 4 Business is increasing
- 3 Business is flat
- 2 Business is decreasing
- 1 Business is fragile

Surveys completed:	85	
Ranking	# businesses	% of total
1	5	6%
1.5	1	1%
2	7	8%
2.5	7	8%
3	18	21%
3.5	2	2%
4	24	28%
4.5	3	4%
5	16	19%
Did not respond	2	2%
Total:	85	100%

More than 50% of decision makers currently rank their businesses as increasing or healthy (4's through 5's). Another 24% report business is either flat or just a bit stronger (3's and 3.5's). Business is decreasing for 16% of downtown retailers (2's and 2.5's), while 7% consider themselves to be fragile (1's and 1.5).

Question #3A: Do you know many of the details of the project's work so far?

Know Many Project Details?	#	%
Surveys completed:	85	
Yes:	52	61%
No:	31	36%
No answer provided:	2	2%
Total:	85	100%

A majority (61%) of survey respondents feel they are overall quite familiar with the details of the Re-Thinking Main Street project.

Question #3B:

If yes – what is your general sense of the potential impacts of this project on your business and Main St. in general?

		your business and want of my general.			
Potential Impacts	# times reported	% of total impacts reported			
Negative					
Lost Parking	21	19%			
Lengthy construction phase	16	16%			
Anti: 3-lanes	14	14%			
Timing (current economy)	4	4%			
Anti: wider sidewalks	2	2%			
Potentially relocate business	2	2%			
Negative overall	2	2%			
Neutral:					
Lot hinges on project					
management/communication	5	5%			
Positive:					
Positive overall	16	14%			
More pedestrian friendly	7	7%			
More green/attractive	7	7%			
Pro: 3-lanes	4	4%			
Heated road/sidewalks	4	4%			
Pro: wider sidewalks	1	1%			
More accessible	1	1%			
Total:	106	100%			

Many survey respondents shared multiple potential impacts, some being both negative and positive for the same respondent. Loss of parking (19%) and duration of construction (16%) were most frequently mentioned as negative impacts, while an overall positive perception of the project was reflected in 14% of total impact responses.



Question #4: What do you hope will be the greatest benefit your business will gain from this project?

Greatest Benefits	# times reported	% of total benefits reported
More foot traffic/More business	37	41%
More attractive/Better experience	15	17%
Improve/Increase parking	7	8%
Better marketing/communication	4	4%
Improved safety	2	2%
Wider sidewalks/expanded seating	2	2%
Don't see benefit	23	26%
Total:	90	100%

Though encouraged to select a single greatest benefit, some businesses added a couple more for good measure. The most popular response by far was the "More foot traffic/More business" vein (41%). The next most popular positive response was "More attractive downtown/Better experience" with 17% of total benefit responses.

When asked this question, 23% of benefit responses reflected decision makers who do not currently see a benefit for their business from the Re-Thinking Main Street project. The most often noted explanation in this category was fear over impact on parking, followed by concerns about duration of construction (also reflected in potential impact data).



Any other thoughts?

		% of total other
Other Thoughts (Themes)	# times reported	thoughts
Frustration w/ current/proposed parking	18	31%
Hope to see more communication/collaboration b/w merchants themselves + b/w merchants + RTMS Desire to focus on filling empty storefronts + promoting upper story	8	14%
development	5	8%
Frustration w/ RTMS project	6	10%
Kudos to RTMS team	4	7%
Frustration w/ City	5	8%
Appreciation for survey	3	5%
Reflections on Market Days	4	7%
Concerns re: Homeless/Mental Health population downtown	2	3%
Kudos to City	2	3%
Desire to see shuttle/public transit options to alleviate parking issues	2	3%
Total:	59	100%

The final, open-ended survey question (unofficially #5), led to a diverse array of heartfelt feedback. Most often, retailers circled back to their ongoing frustrations with current parking and their fears of future lost spots. Many felt they had no voice in the change from meters to kiosks, reported their customers complain regularly about the kiosks, and lamented the further complication of snow banks when accessing kiosks.

A number of merchants are hopeful for an opportunity to connect better with one another on issues ranging from joint extended hours to collaborative approaches for new events. Some retailers also expressed a desire to deepen communication with the RTMS Task Force and assure adequate representation on the Main Street Concord Board of Directors.

General frustrations were shared, covering areas from RTMS to the City in general; kudos were also given, both to the RTMS team and the City.

Following, and in conclusion, is a sampling of "Other Thoughts" in the words of downtown retailers.



"Other Thoughts" - In Their Words

- "Working hard right now to save business."
- "If merchants will be proactive, they'll be okay."
- "Concord is not a walking town."
- "Don't agree that business is 'healthy, but fragile'; think the nature of all retail is to flow with the state of the economy, with those who are willing to accommodate and learn benefiting at the expense of those who expect to always do business as usual."
- "Hope business does well here; really love it here, and love the people."
- "Jessica is a great asset to Main Street."
- "...we merchants need to be kept in the loop for sure."
- "Right now, downtown is just a bunch of buildings with bad parking."
- "I don't think parking is a problem; PERCEPTION is the problem."
- "City bureaucracy seems to work on a 'how to make things slower' approach."
- "People come on Sunday and are mad other businesses are closed."
- "Snow is biggest detriment to business."
- "I'm a destination business; I want to feel good about sending clients out to shop and eat."
- "Thanks for coming around and doing this; it means a lot to the merchants."
- "There are (3) parts to (a successful) downtown: 1. Shops (have to do their part by being as passionate as possible, 2. Landlords (do their part by keeping up buildings, creating new ventures), and 3. Government (be easy to deal with and forthcoming)."
- "I don't subscribe to the idea that the status quo is acceptable."

###

MERCHANT SURVEY

Question #1:

Would you be willing to commit to participating on the Core 40?

If Yes

Question #2: THE BASE LINE

The overall assessment of downtown's economic state is that it is healthy, but fragile. On a scale of 5 to 1 where do you rank your businesses today?

- 5 Business is healthy
- 4 Business is increasing
- 3 Business is flat
- 2 Business is decreasing
- 1 Business is fragile

(If a retailer answers 3-2-1, we expect we might need to do a follow up assessment of some sort to ascertain just how fragile the business might be and if there are resources available to a help a business in decline.)

Question #3

Do you know many of the details of the project's work so far?

If yes – what is your general sense of the potential impacts of this project on your business and Main St. in general?

Question #4

What do you hope will be the greatest benefit your business will gain from this project?

Any other thoughts?



Additional Thoughts from Littleton

(The following are singular reflections from our attending retailers)

PARKING:

- Re-Thinking Main Street aught to be getting back the free parking on Storrs Street.
- If we had a place to park where it was \$200 a year, maybe \$25 a month, we could do that, but \$1,000 is way too much.
- Find us a place to park for free and let us ride the trolley in. Then we will have people on the trolley.
- Municipal parking is only \$.25 an hour and they have parking behind the stores
- Was surprised to hear (another retailer) say Littleton's downtown buildings all had parking behind them. Wasn't there a river on one side? (Yes, but there are a couple of small lots behind a couple of the buildings)
- Parking should stop being the driving force of the conversation. Change the discussion.

CONCORD:

- Half the problem going on now (in Concord) is that people think the decision has already been made and they were not asked.
- Can see both the practical and aesthetic purposes there are so many things that need fixing. Piece-mealing the project is not leveraging opportunities for overall improvements.
- If the city hadn't let the mall, Wal-mart and the other stores be built, we retailers downtown wouldn't be having the problems we have now.
- Many say they do not want changes on Main Street but share no reasons for why
 they are opposed. Just don't want it.
- Some businesses are not on board because their businesses are already so weak.
- 3-lanes seems reasonable but not to widen the sidewalks heat them yes, but only if construction no more than two days.
- Re-Thinking Main Street Team needs to send out reminders to everyone to read the studies.
- We need something to draw people here. A Cheesecake Factory or a Talbots.
- If you can't answer the construction impacts and what happens with parking the retailers will never support this project.
- Don't make this an \$8 million dollar project.
- Too many businesses don't want this project now. Should have done this 10-years ago.
- (Retailer) can't afford to buy some items in my own store.



- All of the retailers need to focus on customer service. Now and during construction.
- Concord does a good job of tucking people away in the stores/restaurants. We hide our customers We need more retailers open at night (Fridays).
- Would like to see Re-Thinking Main Street follow up on the Cornell Study for improved tree growth in downtowns.
- Concord's crosswalks are so hard to see. White paint is not enough.

LITTLETON:

- The remarks made by (retailer) regarding Littleton's dependence on tourism driving the economy, (retailer) seemed to miss that Littleton was a regional hub serving more than 100,000 people and that the locals don't shop when the tourists are in town.
- Locals in Littleton could move around town during construction while the tourists couldn't.
- They have empty storefronts. It was the first thing (retailer) noticed.
- The downside to our trip was we weren't seeing Littleton during peak summer season.
- Flattered by the openness and the availability of the people in Littleton.
- The property owner is like some of our property owners. The buildings have been owned for generations and are owned outright. He gets his rent money every month no matter what the sales at the retail business.
- Appreciated the owner of Italian Oasis restaurant, that the worst part of construction was cutting back his employees hours.

OTHER COMMUNITIES:

- (Retailer) revealed the case study of Keene was causing regret that for not opening business there instead of Concord.
- We can't keep comparing ourselves to Portsmouth and Manchester. They do not have the strong retail we do and are unbalanced with so many restaurants.

OTHER THOUGHTS:

- Wishes more retailers could have come on the trip as it was refreshing to then look at the Main Street Project with fresh eyes.
- Take the wind out the sails of the petition signers. They feel empowered and are walking their message up and down Main Street.
- Regarding the petition each signature needs to be assessed as to why the person signed it – the information was not given in a factual manner but delivered in a coercive manner.
- Find out why people signed it, especially if it was because of intimidation.



FRIENDS OF MAIN STREET

On a number of occasions throughout the Re-Thinking Main Street Project, members of the general public with a very strong interest and passion for downtown requested individual meetings with the executive directors at Main Street Concord and Concord 2020. All requests were granted and in all cases the meetings consisted of focused discussion on certain aspects of the project. Topics included the streetscape, development of upper story housing, providing advice to improve the bottom line for our downtown retailers, life safety on a three lane roadway, etc. By means of expressing how involved people are in the Re-Thinking Main Street Project, the following example is offered.

In early April, 2011, both executive directors and a representative of City Engineering met with Richard Bartlett. Mr. Bartlett is a life-long resident of Concord and a semi-retired Civil Engineer, whose primary profession had been owner and operator of a land surveying business for nearly 30-years. Mr. Bartlett divides his time between his homes, one here in Concord and the other out-of-state. Mr. Bartlett returned to Concord just prior to the final Re-Thinking Main Street Public Information meeting in November and therefore was unable to participate in any outreach efforts.

Upon hearing about the project, Mr. Bartlett engaged the opinions of some of his friends, also long-time residents and property owners. He spoke with some downtown retailers and others in the community in an effort to create a streetscape beautification design with criteria to meet specific goals:

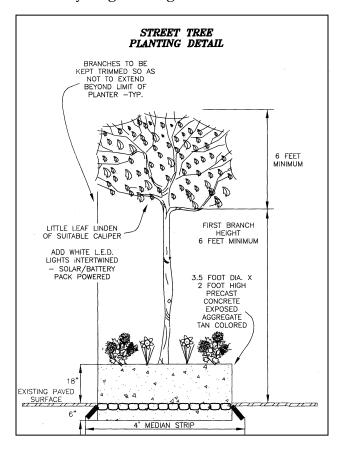
- 1. Maintain the existing four lane configuration.
- 2. No loss of parking.
- 3. Minor improvements to streetscape.
- 4. Maintain existing sidewalk materials and widths.
- 5. Provide minimal disruptions to downtown businesses during construction.
- 6. Final cost that has greater "bang for dollars spent."

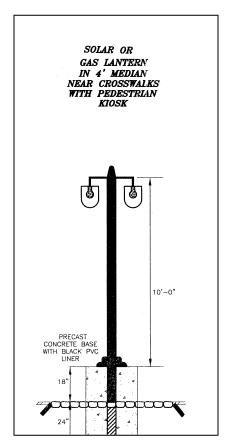
The Project Area is along North and South Main Street bound by Storrs Street to the north, and Concord Street to the South. Thus the area is shorter than the Re-Thinking Main Street Project.

Mr. Bartlett has engaged a group of individuals who are impressed and supportive of his plan and they informally call themselves Friends of Main Street. The plan calls for the construction of thirteen cobblestone raised/planted medians with sloped granite curbing. The cobblestone medians are placed in conjunction with the crosswalks, meaning one before and one following the crosswalks through most of the corridor. Dimensions of the median are four feet wide, by 18 inches high and a depth of 35 inches.



In a written letter accompanied by schematic designs titled *Concept for Beautification of Main Street*, Friends of Main Street requested a formal review of their plan by the Hoyle Tanner team. We communicated to Mr. Bartlett that the Hoyle Tanner team contract ended the previous December and that his plans could receive a preliminary review by the Re-Thinking Main Street Task Force, which includes several professional engineers and staff from City Engineering.





Conceptual Designs from Friends of Main Street

(Note – the written description states the cobblestone medians are 35 feet long by 4 inches wide. It is believe the marks designating measurements were transposed.)

Initial observations include the following:

Tree Plantings in Median:

• Minimum recommended width for shade tree plantings in median islands is 10'; for smaller trees islands can be reduced to 6' but it's not usually recommended.



- Trees within median islands are usually planted in rows of more than three. The single tree is more exposed to the traffic and has a smaller planting area for water infiltration. The longer rows of trees also have a traffic calming effect, while the single tree might be viewed as a traffic hazard.
- The 4' width provides an insufficient area for root colonization, especially for larger shade trees.
- Any proposed median plantings should also take into consideration the quality of the soil. In urban areas soil may need to be substituted.
- The single tree in the median island would be damaged during snow removal and the lower branches would not have enough clearance from larger vehicles and trucks. The 6 ft branch height and possibly the street lamp design needs to consider a semitrailer truck with side-view mirrors driving alongside the 4 ft island
- The location of the utilities underneath the planting bed conflicts with the tree growth.
- The trees would not grow to a sufficient height and mass to truly have a significant impact on the streetscape of downtown.
- A 4 ft island is likely too narrow to be able to support vegetation. Temporary planters like whiskey barrels are an option, but the narrow 4-ft island will be maintenance-unfriendly for people who need to water/maintain the plants while traffic is active.

Cobblestone Medians:

- Introduction of pedestrian islands are a great streetscape option however with existing road width constraints today, Main Street would need to drop to a three-lane section.
- The roughly 14-1/2 ft angle parking that exists today is inadequate. Maintaining this parking space depth under the proposed design does not account for long pickups or poorly parked SUV's sticking out beyond the parking lines and into the right travel lane. These vehicles reduce the right travel lane sufficiently that cars shift partially to the left lane for clearance. With raised islands (not continuous but intermittent as proposed in the drawings and two narrower thru lanes), vehicles in the left lane would easily tend to shift rightward. Ergo, if a long vehicle parks near an island, there is effectively width for one lane and in this case a sudden merge or quick stop (or aggressive race to get by first) by one or both vehicles that happen to be travelling nearly side-by-side along Main Street will be an operational problem with increased crash potential. In a similar vein, the island at Depot Street, coupled with a few large vehicles parked on the southbound side, will act to stop all traffic when one of the frequent left-turns into Depot waits for a gap to turn left.
- Islands make a great refuge for pedestrian crossings and it would be a big plus to locate islands at crosswalks. But a refuge island in this context should probably be a



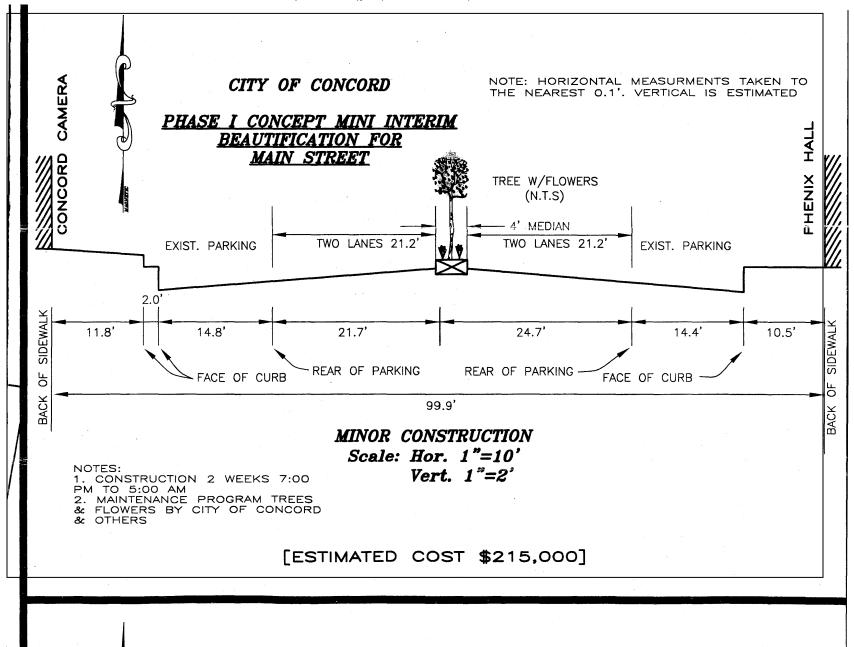
- 6 ft minimum and desirably wider to allow for a pedestrian walking a bicycle, stroller, access for a wheelchair, etc.
- The proposed lane widths would be narrowed through the corridor to accommodate the medians and maintain the four lanes. For comparison, drivers will experience the same closeness and discomfort as is felt traveling on Loudon Road under the I-93 bridges.
- General Services currently plows snow to the center of the street then removes it later. They may have a concern on how the islands affect their secondary removal of the snow bank.

The Friends of Main Street designs included two sets of estimates for cost and length of construction period:

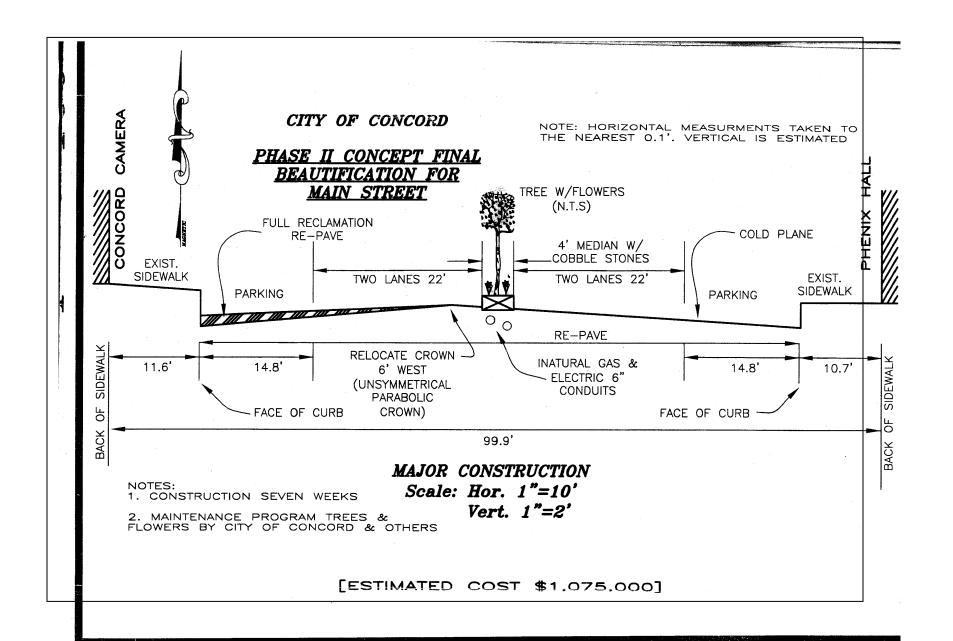
- 1. \$215,000 for installation of 13 cobblestone medians constructed at night (7:00 p.m. to 5:00 a.m.) over the course of two weeks.
 - Estimate includes trees, restriping, 30% contingency, plantings and lights. Cost of labor and other standard expenses appear absent. Line item budget was not provided.
- 2. \$1,075,000 for installation of 13 cobblestone medians and removal of double step curb on the westerly side of Main Street constructed at night (7:00 p.m. to 5:00 a.m.) over the course of seven weeks.
 - The plan adds conduit for electrical and natural gas, 15 lamp posts operating on natural gas or solar power, replaces the concrete median on North Main Street from Storrs Street to Centre Street, full reclamation and re-grade of Main Street, replacement of manhole frames, catch basin frames, water shut-offs. Cost of labor and other standard expenses appear absent. Line item budget was not provided.

In summary, the designs are inconsistent with the standards set by the American Association of State Highway and Transportation Officials (AASHTO) and/or Manual on Uniform Traffic Control Devices (MUTCD). Concord could not realistically construct these with the width limitations of the roadway as recommended in the Friends of Main Street plans. Likewise, the Hoyle Tanner team offered an appropriate planted median design for Main Street, which was not embraced by the public as pedestrian islands were viewed to be obstructions to fire fighters and snow plows. From the perspective of pedestrian safety and aesthetics, when appropriately landscaped, pedestrian medians would be a great addition to downtown.





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CITY OF CONCORD

