

DOWNTOWN FOLEY

FOLEY, ALABAMA



MARKET STUDY AND STRATEGIES 2019

INTRODUCTION

The economic landscape of traditional downtown and neighborhood commercial districts continues to change. Expanding retail competition, evolving technologies, and changing lifestyle trends continue to affect business opportunities and the way of life in our traditional downtown business districts.

Main Street Alabama commissioned this study to engage stakeholders, promote an in-depth understanding of local and regional market conditions, trends impacting Downtown Foley's economic performance, and opportunities for the future. Information and direction gained from the study provide a sound basis for local decision-making processes and strategies for enhancing Downtown Foley.

This document summarizes key strategies for Downtown Foley's economic development and enhancement initiatives based on an extensive review of background information and current market data, input provided via consumer and business surveys, and direction and leadership provided by Foley Main Street (FMS) leaders and volunteers. Supplemental documents referenced in this summary document include:

- ▶ Downtown Foley Market Snapshot
- ▶ Downtown Foley Consumer Survey Results
- ▶ Downtown Foley Business Survey Results



For more information contact
Main Street Foley, Inc.

120 South McKenzie Street
Foley, Alabama 36535

☎ (251) 366-1565

✉ foleymainstreet@gmail.com

🌐 foleymainstreet.com



Creating Jobs. Keeping Character.

Main Street Alabama retained Downtown Professionals Network (DPN) to facilitate the Downtown Foley Market Study and Strategies project as part of a comprehensive "self-help program" that provides training and technical assistance to select Main Street Alabama member communities.



INSIDE

Introduction	1
Community Profile	2
The Downtown Foley Market	3
Market Insights and Directions.....	5
Business Insights and Directions.....	12
Targets	15
Moving Forward	22

Limitations and Disclaimers

Retail market studies and analyses, their components (such as retail sales gap analyses and surveys interpretation) and derivative business development plans provide important guidance on how a commercial area should, theoretically, be able to perform and on the sales levels businesses should be able to achieve. However, a number of factors affect the actual performance of businesses and commercial areas, including the skills of the business operator, level of business capitalization, the quality of the physical environment, changes in overall economic conditions, the effectiveness of business and district marketing programs, and many other factors. The information in this document is intended to provide a foundation of information for making district enhancement and business development decisions, but it does not and cannot ensure business success.

As is true of all demographic, economic and market studies, our analysis' reliability is limited to the reliability and quality of the data available. Our research assumes that all data made available by and procured from federal, state, county, city, primary and third party sources is accurate and reliable.

Because market conditions change rapidly and sometimes without warning, the information and opinions expressed here represent a snapshot in time and cannot predict or gauge future changes or results.

COMMUNITY PROFILE

Welcome to Foley

Just eleven miles north of Alabama's white sand beaches, Foley's historic downtown epitomizes old Alabama charm. Historic sites, boutique retailers and unique restaurants line the walkways of this quaint Main Street making visitors feel like they've stepped back in time.

Among its traditional architecture and old-world style, downtown Foley features restaurants, gift shops, barbershops, antique markets and even a hidden spa for unwinding after a long day of shopping. With beautiful flowers dotting intersections, a streetlight lined seven-acre park, and the colorful hanging floral baskets, Foley captivates visitors and residents alike with its picturesque beauty. Newly remodeled buildings and downtown revitalization activities add to this area's appeal, thus attracting a plethora of new, diverse businesses and potential downtown housing. Professional offices are sprinkled among the Main Street district offering conveniences to the nearby residents. It has also become a popular lunch destination due to its eclectic cuisine options including Mediterranean, Italian, vegan, and Southern-style restaurants all within a stone's throw of one another. Quaint coffee shops and local art shops can also be found in this charming area.

Brimming with history, downtown Foley is home to two city museums housed in their original, historic buildings and an "old time" soda fountain drugstore that has donned the same corner since 1929. The Holmes Medical Museum is housed in Baldwin County's first hospital and showcases extensive displays of medical equipment and patient rooms as they would have been in the 1930s and '40s. The Foley Railroad Museum includes a model train exhibit, antique train cars and train rides around the park. It is housed in the Depot which was built in 1909 and has been the hub of activity in the City for over 60 years.

Downtown Foley is also home to the Wilbourne Antique Rose Trail which follows the former route of the Louisville and Nashville Railroad into downtown Foley. You can walk the landscaped trail while enjoying the beauty and fragrance of hundreds of roses displayed in a variety of sizes and color.

Located at the heart of Baldwin County's busiest intersection with an average of forty-thousand cars per day, Foley has significant commercial appeal, especially with its newly built pedestrian bridge connecting the shops of downtown with the park and city buildings allowing accessibility and walkability for visitors and residents alike.



THE DOWNTOWN FOLEY MARKET

Downtown Foley Drive Time Market

Demographic Fast Facts ESRI 2018



POPULATION

24,310

10 MINUTE DRIVE TIME | 2018
2018—23 GROWTH: 11.4%

Population	5 Min	10 Min	20 Min
2018 Estimate	9,644	24,310	73,101
Growth (2018-23)	11.1%	11.4%	11.3%
Est. State Pop Growth (2018-23)	2.1%		



DAYTIME POP

12,004

5 MINUTE DRIVE TIME | 2018
DAYTIME CHANGE: 24.5%

Daytime Population	5 Min	10 Min	20 Min
Total Daytime Pop	12,004	25,780	68,555
Daytime Change	24.5%	6.0%	-6.2%



HOUSEHOLDS

9,659

10 MINUTE DRIVE TIME | 2018
2018—23 GROWTH: 11.3%

Households	5 Min	10 Min	20 Min
2018 Estimate	3,979	9,659	29,170
HH Growth (2018-23)	10.9%	11.3%	11.0%
Est. State HH Growth (2018-23)	2.2%		



MEDIAN HH
INCOME

\$46,437

10 MINUTE DRIVE TIME | 2018
2018—23 GROWTH: 12.5%

Median HH Income	5 Min	10 Min	20 Min
2018 Estimate	\$42,797	\$46,437	\$49,573
Growth (2018-23)	12.3%	12.5%	12.2%
2018 State: \$47,060	2018-23 Growth: 12.5%		



PER CAPITA INCOME
2018

5 Minutes	\$22,103
10 Minutes	\$25,041
20 Minutes	\$26,758
State	\$26,505



MEDIAN AGE
2018

5 Minutes	40.5
10 Minutes	41.6
20 Minutes	41.2
State	39.3



2018 EMPLOYED
CIVILIAN POP 16+

5 Minutes	93.4%
10 Minutes	95.4%
20 Minutes	95.8%
State	94.6%

Source: [Esri Market Profile](#) | 12.18

Top Esri Tapestry LifeMode Groups

Downtown Foley Drive Time Areas | Esri 2018

Esri Tapestry LifeMode groups represent markets that share a common experience—born in the same generation or immigration from another country—or a significant demographic trait, like affluence. The GenXurban and Rustic Outposts LifeMode Groups are among those most prevalent in the Foley drive time areas.

GenXurban (LM10) | #1 in 5 Minute Drive Time

5 Minutes		10 Minutes		20 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
1,704	42.8%	3,241	33.6%	6,009	20.6%

- ▶ Gen X in middle age; families with fewer kids and a mortgage
- ▶ Second largest Tapestry group, comprised of Gen X married couples, and a growing population of retirees
- ▶ About a fifth of residents are 65 or older; about a fourth of households have retirement income
- ▶ Own older single-family homes in urban areas, with 1 or 2 vehicles
- ▶ Live and work in the same county, creating shorter commute times
- ▶ Invest wisely, well-insured, comfortable banking online or in person
- ▶ News junkies (read a daily newspaper, watch news on TV, and go online for news)
- ▶ Enjoy reading, photo album/scrapbooking, playing board games and cards, doing crossword puzzles, going to museums and rock concerts, dining out, and walking for exercise

Rustic Outposts (LM10) | #1 in 10/20 Minutes

5 Minutes		10 Minutes		20 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
0	0.0%	639	14.7%	4,375	45.5%

- ▶ Country life with older families in older homes
- ▶ Rustic Outposts depend on manufacturing, retail and healthcare, with pockets of mining and agricultural jobs
- ▶ Low labor force participation in skilled and service occupations
- ▶ Own affordable, older single-family or mobile homes; vehicle ownership, a must
- ▶ Residents live within their means, shop at discount stores and maintain their own vehicles (purchased used) and homes
- ▶ Outdoor enthusiasts, who grow their own vegetables, love their pets and enjoy hunting and fishing
- ▶ Technology is cost prohibitive and complicated. Pay bills in person, use the yellow pages, read newspapers, magazines, and mail-order books

Source: [Esri Community Tapestry Segmentation](#) | 12.18

THE DOWNTOWN FOLEY MARKET

Retail View ESRI 2017

Esri's Retail MarketPlace data provides a direct comparison between retail sales and consumer spending by industry. To capture a snapshot of an area's retail market, estimates of supply (retail sales by businesses) are compared to estimates of demand (potential sales based on consumer spending) with the result expressed as a surplus or leakage. The following example shows a calculation resulting in sales leakage, which can be an indication that local households are purchasing from businesses located outside the defined drive time, purchasing products online, or any combination of those and other scenarios.

Example: Calculating Sales Surplus/(Leakage) Estimates

Estimated Actual Sales — Potential Sales = Surplus/(Leakage)

Category: Food Services & Drinking Places (NAICS 722)

Estimated Sales (Supply)	\$33,911,340
— Potential Sales (Demand)	\$9,881,964
= Surplus or (Leakage)	\$24,029,376

Esri estimates of actual sales reflect current dollars derived from receipts of businesses primarily engaged in selling merchandise. Potential sales is estimated by using Esri's consumer spending data, which provides estimated expenditures for more than 700 products and services that are consumed by U.S. households. The estimate of a trade area's, or drive time's, demand is based upon estimated expenditures by households within the defined trade area. The following table displays the total amount of estimated sales surplus or leakage for the three drive times.

DOWNTOWN FOLEY DRIVE TIME AREAS

SALES SURPLUS AND LEAKAGE ESTIMATES | (\$MM)

Sales Surplus & Leakage (\$MM)	5 Minutes	10 Minutes	20 Minutes
Categories	Surplus/ (Leakage)	Surplus/ (Leakage)	Surplus/ (Leakage)
Retail Trade (NAICS 44 – 45)	\$237.8	\$451.6	\$458.6
Food & Drink (NAICS 722)	\$24.0	\$45.0	\$66.3
Total (NAICS 44 – 45, 722)	\$261.8	\$496.6	\$524.9

Source: Esri and Infogroup. Retail MarketPlace 2018. Copyright 2017 Infogroup, Inc.

Data Note: The Retail Gap (Sales Surplus/Leakage) represents the difference between Retail Potential and Retail Sales. In the table above, a negative value represents leakage in retail sales, often indicating a market where customers may be leaving the area to make purchases, purchasing products online, or any combination of those and other scenarios.

Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as three industry groups within the Food Services & Drinking Places subsector.

Performance by Category



Sales gap factors provide an at-a-glance means of assessing the relative strength of various retail categories within a defined geography. The factor is a measure of the relationship between supply and demand that ranges from +100 (total surplus) to -100 (total leakage). A positive value represents a surplus of retail sales and can be indicative of a market where customers are drawn in from outside the trade area. Categories showing the highest surplus factors may signal possible opportunities for expansion or the introduction of complementary product and service lines to build on market strengths or existing and evolving niche markets. Likewise, categories with negative value factors might offer an initial indication of gaps in the business mix and potential targets for expansion or recruitment.

SALES GAP FACTORS | 10 MIN & 20 MIN DRIVE TIME AREAS

Category—Factor	10 Min	20 Min
Motor Vehicle & Parts Dealers	33.6	10.8
Furniture & Home Furnishings Stores	33.5	24.0
Electronics & Appliance Stores	(30.5)	(38.0)
Building Materials, Garden & Supply	67.4	37.8
Food & Beverage Stores	8.8	(1.7)
Health & Personal Care Stores	38.4	14.2
Gasoline Stations	35.7	13.2
Clothing and Clothing Accessories	80.9	58.3
Sporting Goods, Hobby, Book, Music	40.7	4.3
General Merchandise Stores	46.8	27.4
Miscellaneous Store Retailers	81.0	58.2
Nonstore Retailers	14.1	(9.4)
Food Services & Drinking Places	46.8	28.2

Source: [Esri Retail MarketPlace Profile](#) | 12.18

Note: The complete Downtown Foley Market Snapshot and source Esri reports are available as supplemental documents to this report.

MARKET INSIGHTS AND DIRECTIONS

Downtown Appeal and Uses

Overall visit rates cited by consumer survey participants reflect the broader attraction of downtown created by a diverse mix of business types, uses and activities—led by dining, festivals and special events, and shopping.

72%

Visited Downtown Foley for **Dining** within the past year.

Source: 2019 Downtown Foley Consumer Survey.

Table 1

Q: For which of the following activities or purposes have you visited Downtown Foley within the past year?

Top Consumer Survey Responses	Percent
Dining	71.6%
Festivals/Special Events	64.3%
Shopping	58.7%
Banking/Financial Services	49.4%
Library	43.4%
Recreation	29.7%
Government	26.4%
Work	23.9%

Source: 2019 Downtown Foley Consumer Survey. Most frequent responses shown.

53%

Visit Downtown Foley to do **errands or for office and service-related purposes** on a daily or weekly basis.

Source: 2019 Downtown Foley Consumer Survey.

Consumer patterns depicting the multi-purpose nature and appeal of the downtown are reinforced by data showing more than 52% visit the downtown area on a daily or weekly basis to do errands or for office and service-related purposes; about 25% for eating, drinking and/or entertainment; and more than 14% to shop.

Table 2

Q: How often do you visit Downtown Foley...

Frequency—Daily or Weekly	Percent
To do errands or for office and service-related purposes?	52.6%
For eating, drinking and/or entertainment?	24.5%
To shop?	14.2%

Source: 2019 Downtown Foley Consumer Survey.

Big Data

Proposed strategies, directions and actions outlined in this document are rooted in current market information and community input via:

- ▶ The Main Street Alabama Resource Team Visit conducted in September 2018
- ▶ A consumer online survey with a total sample of **807 respondents**
- ▶ A Downtown Foley business survey completed by **61 business representatives**

Insights

- ▶ The wide range of activities and purposes attracting people to the downtown area illustrates the importance of a diversified business mix, including service sector business and public facilities that help to generate traffic to support retail and eating & drinking uses.
- ▶ Office and service uses, government institutions, recreational attractions and other non-retail uses all play important roles as part of the downtown mix and, thus, share an interest in the district's prosperity.

Directions

Economic Vitality

- ▶ Continue to encourage office, service and other appropriate non-retail uses to locate in the downtown area (see page 19 for more).

Organization

- ▶ Continue efforts to engage partners from all sectors of the community in downtown enhancement initiatives.

Promotion

- ▶ Facilitate and encourage collaborative marketing efforts to heighten awareness for the full range of goods and services catering to the everyday needs of Foley area residents.
- ▶ Promote hospitality training and cross-marketing to enhance awareness, encourage businesses to adopt a tour guide or concierge approach to customer service, and increase referrals.

Potential Activities

- (E) Building/Business inventory (w/ regular updates)
 - (O) Presentations/updates to partners & community groups
 - (P) Encourage/Facilitate cross-promotion efforts
 - (P) Regular (weekly?) FB Business Highlight/Focus posts
 - (P) Downtown Businesses & Services Directory
 - (P) Promote hospitality training to increase referrals
- (D) Design (E) Economic Vitality (O) Organization (P) Promotion

MARKET INSIGHTS AND DIRECTIONS

Anchors and Traffic Generators

Stacey's Drug & Old Tyme Soda Fountain garnered the most mentions as the business or place frequented most often. Stacey's is seemingly, in many ways, a Foley institution, which along with other businesses and places most frequently visited, provides valuable support for existing and possible downtown retail establishments.

24%

Named **Stacey's Drug & Old Tyme Soda Fountain** as the downtown business or place visited most frequently.

Source: 2019 Downtown Foley Consumer Survey.

Table 3
Most Frequented Business or Places (Top 10)

1. Stacey's Drug	6. Post Office
2. Foley Public Library	7. Heritage Park
3. Drowsy Poet	8. Portabella's Restaurant
4. Mamma Mia Pizzeria	9. Region's Bank
5. BB&T Bank	10. Gypsy Queen Java

A number of entries appearing in the Top Ten demonstrate again the importance of service businesses, public facilities and other non-retail uses as part of the Downtown Foley business mix—and the eclectic nature of the downtown experience. Moreover, the results can provide direction for strategies and activities that:

- ▶ Capitalize on existing anchor businesses and activity generators, including complementary business opportunities; and
- ▶ Heighten awareness for the local and eclectic nature of the business mix and the full range of products, services and experiences offered in Downtown Foley.



Insights

- ▶ Long-time businesses, like Stacey's and Mamma Mia Pizzeria, are important anchors for Downtown Foley with strong connections to the local market. These institutions could offer cues for complementary business types that might be a good fit for Downtown Foley.

Directions

Design

- ▶ Incorporate design features (i.e. pedestrian wayfinding signage, kiosks, etc.) in proximity to downtown anchors to help users locate and navigate complementary businesses and amenities in the downtown area.

Economic Vitality

- ▶ Explore opportunities for existing businesses to expand or reposition themselves to capitalize on existing anchor businesses and activity generators, and for new, complementary business types to join the mix.
- ▶ Perform follow-up research (i.e. intercept surveys) to better understand the downtown's appeal and attraction among visitors and seasonal residents; businesses, attractions and amenities that might make them visit more often; and preferred marketing and communications channels.

Organization

- ▶ Identify and pursue possibilities to work with high traffic-generating businesses and attractions to disseminate information about Foley Main Street, its work and progress, and opportunities to participate.

Promotion

- ▶ Target higher-traffic generating locations identified, both within and outside the downtown, for display and distribution of Downtown Foley promotional materials.

Potential Activities

- (D) Downtown pedestrian wayfinding signage/features
- (E) Visitor/Seasonal Resident intercept surveys
- (O) FMS info displays and meet & greet events at anchors
- (P) Downtown promo displays/materials at anchors

(D) Design (E) Economic Vitality (O) Organization (P) Promotion

MARKET INSIGHTS AND DIRECTIONS

Marketing and Communications Channels

Consumer preferences for social media and online applications, along with the adaptation of online channels by downtown businesses, demonstrate the importance of, and potential benefits for, Foley Main Street and downtown businesses to have a strong online presence.

88% Of those surveyed regularly use **Facebook**.

Source: 2019 Downtown Foley Consumer Survey.

Table 4

Q: Which of the following social media networks or online applications do you regularly use?

Top 5 Consumer Survey Responses

Facebook	87.6%
Instagram	36.7%
YouTube	33.1%
Pinterest	32.4%
eBay	15.5%

Source: 2019 Downtown Foley Consumer Survey. Most frequent responses shown.

55% Of businesses surveyed identified **Social Media** as one of the most effective sources for promoting their business, and 86% indicated they use Facebook.

Source: 2019 Downtown Foley Business Survey.

Table 5

Q: Which of the following social media networks or online applications does your business use?

Top 3 Business Survey Responses

Facebook	86.4%
Instagram	39.0%
LinkedIn	16.9%

Table 6

Q: In which of the following ways would you consider participating in a clearly defined and collaborative marketing campaign for Downtown Foley?

Responses

Invest my time	59.6%
Invest my talent	42.3%
Invest financially	26.9%

Source: 2019 Downtown Foley Business Survey. Multiple responses allowed. Most frequent responses shown.

Insights

- ▶ Online usage rates among both consumer and business survey respondents provide readily accessible channels for businesses and organizations to communicate with members in the local market.
- ▶ Businesses with collectible, specialty, and custom merchandise lines, in particular, could potentially benefit further as social media platforms continue to integrate more robust retail showroom and targeted marketing applications (i.e. Facebook's Marketplace).
- ▶ Businesses of all types, including retailers carrying staple products, stand to benefit from a strong online presence as more and more local consumers use the Internet to shop and compare products and services, and then use it – in much the same way previous generations used the Yellow Pages – as a resource to find a local outlet or vendor to make their purchase.
- ▶ Sixty percent of businesses surveyed indicated they would consider participating in some fashion in a collaborative marketing campaign for Downtown Foley, suggesting the time to introduce new collaborative and cross-marketing opportunities could be opportune.

Directions

Economic Vitality

- ▶ Share survey results demonstrating local consumers' social media preferences with downtown businesses as a business visitation topic and/or as part of social media training.

Organization

- ▶ Continue to employ Facebook as a core component of Foley Main Street's communications system and work to incorporate or enhance utilization of other social media platforms and applications as part of the mix (i.e. YouTube, Instagram, Pinterest, etc.).

Promotion

- ▶ Design downtown and collaborative marketing campaigns to be compatible with social media applications as a primary channel for the promotion of events and downtown image enhancement messaging—and as a highly cost-efficient way for downtown businesses to participate and plug-in.

Potential Activities

- (E) Share consumer media preferences with businesses
- (O) Continue to employ Facebook as a core platform
- (O) Expand social media presence to other applications
- (P) Develop a framework for collaborative marketing
- (D) Design (E) Economic Vitality (O) Organization (P) Promotion

MARKET INSIGHTS AND DIRECTIONS

Downtown Traits and Trends



Survey groups showed the highest level of agreement with the statements, “**Special events create vibrancy in the downtown**” and “**Downtown Foley is a good investment.**”



Consumers surveyed showed the lowest level of agreement with the statement, “**I tell my friends and family to shop downtown.**”

Source: 2019 Downtown Foley Consumer and Business Surveys.

Table 7

Q: Using a scale from 1 (Disagree Completely) to 5 (Agree Completely), please indicate your level of agreement with the following statements about Downtown Foley:

Consumers (C) and Businesses (B) Average Rating and (Rank)		
Statements	(C)	(B)
Special events create vibrancy downtown.	4.39 (1)	4.21 (2)
Downtown Foley is a good investment.	4.07 (2)	4.27 (1)
Downtown is clean and inviting.	3.92 (3)	4.04 (5)
I feel safe downtown, even at night.	3.84 (4)	4.21 (2)
Downtown presents a positive image to visitors.	3.80 (5)	4.11 (4)
Downtown is pedestrian-friendly.	3.65 (6)	3.72 (8)
Customer service is exceptional in downtown.	3.65 (6)	3.89 (7)
Downtown is bicycle-friendly.	3.00 (8)	3.21 (10)
Downtown has things to do for many ages.	2.87 (9)	3.22 (9)
I tell my friends and family to shop downtown.	2.74 (10)	3.91 (6)

Source: 2019 Downtown Foley Consumer and Business Surveys.

66%

Of businesses surveyed, and 58% of the consumer survey group, chose “**Improving or making progress**” to describe recent trends.

Source: 2019 Downtown Foley Consumer and Business Surveys.

Table 8

Q: Which of the following best describes recent trends in Downtown Foley?

Consumers (C) and Businesses (B) Percent		
Recent Trends	(C)	(B)
Improving or making progress	58.3%	66.1%
Steady or holding its own	34.5%	25.0%
Declining or losing ground	7.2%	8.9%

Source: 2019 Downtown Foley Consumer and Business Surveys.

Insights

- Events, like the Movies in the Park, Let it Snow, and Foley’s annual Christmas Parade, help “create vibrancy in downtown” and, as such, should be considered a wise investment. Events like these should also be embraced as one avenue to help address an expressed want for recreation and entertainment, and to address the low ratings ascribed to the statement, “Downtown has things to do for many age groups.”
- Views on Downtown Foley as a good investment, along with positive takes on recent trends, can provide additional momentum for new and ongoing initiatives.
- Marketing and public relations efforts should continue to highlight the downtown’s recreational amenities and attractions that contribute to its “fun factor,” and emphasize positive changes and progress in the district in an effort to broaden community awareness.

Directions

Design

- Pursue projects, like the alleyway improvements proposed in the Main Street Alabama Resource Team report and other placemaking initiatives—to generate interest, enliven spaces, create “stickability,” and further advance the downtown’s image as a place for family, fun, culture, recreation, and entertainment.

Economic Vitality

- Incorporate positive views on the downtown as a “good investment” and recent trends described as “Improving or making progress” in messaging and materials to promote business and investment opportunities.

Promotion

- Stage and support family-oriented activities with a strong local flavor to “create vibrancy downtown,” to promote the larger downtown experience, and to invite visitors and seasonal residents to experience “Real Foley’s” local culture.
- Identify possible festival and event components that might be introduced, expanded, test-marketed and used to enhance the downtown’s “entertainment factor” and “stickability” on a more regular or even permanent basis, including entertainment acts, amusements, and event vendors who might be “Pop-up Shop” candidates.

Potential Activities

- (D) Placemaking activities focused on fun and “stickability”
- (E) Promote downtown as a “good investment”
- (P) Family events (i.e. ice cream social, street dance, etc.)
- (P) Event test market opportunities (i.e. booths, Pop-ups)

(D) Design (E) Economic Vitality (O) Organization (P) Promotion

MARKET INSIGHTS AND DIRECTIONS

Potential Business Opportunities

Q: Which of the following types of eating and drinking establishments would make you visit downtown more often?

47%

Selected **Breakfast/Brunch Restaurant** as one of their top choices.

Source: 2019 Downtown Foley Consumer Survey.

Table 9

Top 5 Selections

Bakery	48.4%
Breakfast/Brunch Restaurant	46.9%
Steakhouse	43.2%
Deli/Sandwich Shop	43.0%
Brewery or Brewpub	42.2%

Q: Which of the following types of retail establishments would make you visit downtown more often?

60%

Selected **Bakery** as one of their top choices.

Source: 2019 Downtown Foley Consumer Survey.

Table 10

Top 5 Selections

Bakery	59.6%
Specialty Foods & Wines	56.8%
Women's Clothing	50.2%
Home Furnishings and Gifts	37.3%
Arts, Crafts and Hobbies	34.6%

Consumer Online and Out-of-Town Purchases

50%

Of consumers surveyed went online or left Foley to purchase **Gifts** within the past year.

Source: 2019 Downtown Foley Consumer Survey. Most frequent responses shown.

Table 11

Q: What type(s) of products have you purchased online or left Foley to purchase within the past twelve months?

Gifts	50.1%
Toys	48.0%
Electronics	47.2%
Beauty Supplies	42.2%
Home Furnishings	39.5%
Books	37.8%
Shoes	29.3%
Men's Clothing	27.1%
Hobbies and Crafts	26.8%
Specialty Foods & Wines	22.8%

Insights

- ▶ Business types and different product lines identified by consumers as most wanted might provide opportunities for existing downtown businesses to reposition themselves in the market, to add complementary products or services, or even to expand.
- ▶ Products frequently purchased online or away from Foley could provide additional queues for local marketing and business opportunities.
- ▶ Downtown eating and drinking establishments and retailers incorporating family-centered entertainment and amenities, in-house events and activities, and locally-inspired décor to create an “experience” stand to benefit from consumers’ affection for the downtown environment and historic character, and expressed demand for entertainment and recreation. In-store amenities, décor and activities that feature local culture could also appeal to the important visitor and seasonal resident markets.

* See pages 15—19 for more on business opportunities

Directions

Economic Vitality

- ▶ Share survey results on expansion and recruitment opportunities with existing businesses and discuss possibilities for businesses to add products or services, to reposition themselves in the market, or to expand.
- ▶ Share survey results with property owners and agents and discuss business types and models that might be targeted for vacant properties and spaces, along with improvements that might be required to accommodate targeted tenants.
- ▶ Introduce a vacant storefront treatment program, such as a “This Space is Not Empty” poster program.
- ▶ Publicize and promote survey results identifying business types showing potential for expansion and recruitment to heighten awareness, appeal to local entrepreneurs, and help generate leads.

Potential Activities

- (E) Business visits and roundtables to share survey results
- (E) Vacant property visits to identify targeted uses
- (E) Vacant property poster/storefront treatment program
- (E) Publicize survey results and a list of “top prospects”

(D) Design (E) Economic Vitality (O) Organization (P) Promotion

MARKET INSIGHTS AND DIRECTIONS

Priorities



Both survey groups placed the highest priority on possible efforts to, **“Create incentives for new and expanding downtown businesses.”**

Source: 2019 Downtown Foley Consumer and Business Surveys.



The consumer survey group, as compared to the business group, placed a higher priority on possible efforts to, **“Stage additional festivals and special events in the downtown.”**

Source: 2019 Downtown Foley Consumer and Business Surveys.

Table 12

Q: On a scale from 1 (Low) to 5 (High), what level of priority

Consumers (C) and Businesses (B) Avg. Rating and (Rank)		
Enhancement Efforts	(C)	(B)
Create incentives for new and expanding downtown businesses	4.36 (1)	4.31 (1)
Stage additional festivals and special events in the downtown	4.22 (2)	4.06 (3)
Restore and preserve the downtown's historic character	4.18 (3)	3.89 (4)
Improve the downtown's streets, sidewalks, lighting, furnishings, green spaces, trails, etc.	4.16 (4)	4.25 (2)
Improve and/or create more housing in the downtown area	2.94 (5)	3.24 (5)

Source: 2019 Downtown Foley Consumer and Business Surveys.

First Things: Both survey groups most frequently offered suggestions pertaining to business recruitment and diversification efforts when asked, “What is the first thing you would do to improve downtown Foley?”

Table 13

Q: What is the first thing you would do to improve Downtown Foley?

Categorized Topics	Consumers	Businesses
Add/Recruit Businesses; Diversify Mix	39.1%	28.0%
Buildings and Appearances	16.5%	16.0%
Traffic and Transportation	12.2%	14.0%
Parking	7.3%	6.0%
Streetscape and Public Spaces	6.3%	8.0%
Business Operations and Practices	4.3%	2.0%
General Maintenance and Cleanliness	2.1%	14.0%

Source: 2019 Downtown Foley Consumer and Business Surveys.
Most frequent categorized responses shown.

Cloud View | Consumer Survey

What is the first thing you would do to improve Downtown?



Directions

Design

- ▶ Continue efforts to restore and preserve the downtown's historic character, with an emphasis on improvements that showcase the community's historic fabric and identify with local values, culture, and characters.

Economic Vitality

- ▶ Employ a volunteer-led business visitation program and host roundtables with downtown property and business owners, local government officials and staff, area developers and investors, and other development interests to identify and address challenges and barriers posed to existing and prospective businesses, developers and investors.
- ▶ Engage local government, financial and educational institutions, and other appropriate entities in efforts to identify, develop, and access incentives and technical assistance for existing, new and expanding downtown businesses, including programs supporting the local entrepreneurial ecosystem. Refer to Main Street Alabama's Development Guide for information on resources, programs, tools, and examples.
- ▶ Create a business assistance resources directory that maps the process for starting a business and that includes a listing with contact information for business assistance providers, resources and programs on the local, state and national level.

Promotion

- ▶ Work closely with downtown businesses to evaluate and enhance existing events, and to identify opportunities—and resources—for the introduction of new events.

Potential Activities

- (E) Incentives for buildings and new/expanding businesses
- (E) Business assistance resources directory
- (P) Engage businesses to evaluate events (i.e. post-survey)
- (D) Design (E) Economic Vitality (O) Organization (P) Promotion

MARKET INSIGHTS AND DIRECTIONS

Like Most



Environment, Character and Feel

Both survey groups most frequently identified features related to Downtown Foley's **environment, character and feel** as things they like most.

Source: 2019 Downtown Foley Consumer and Business Surveys.

Table 14

Q: What is the one thing you like most about Downtown?

Categorized Responses	Consumers	Businesses
Environment; Character and Feel	27.2%	51.0%
Appearances; Décor and “Look”	16.7%	8.2%
Heritage Park/Rose Trail	13.8%	8.2%
Businesses; Business Mix	12.8%	8.2%
History and Historic Character	8.3%	12.2%
Accessibility/Convenience	7.3%	2.0%
Festivals, Events and Entertainment	3.1%	2.0%
Pedestrian Bridge	2.0%	2.0%
Special Features—Other	2.2%	4.1%

Source: 2019 Downtown Foley Consumer and Business Surveys. Most frequent categorized responses shown.

Cloud View | Consumer Survey

What is the one thing you like most about Downtown?



Findings and “buzzwords” can lend direction for creating and fine-tuning branding strategies and messages that connect audiences with the downtown’s most highly recognizable and distinguishable features to establish and reinforce a strong market position for Downtown Foley.



Insights

- ▶ Text analysis of consumer survey responses, shown on this page's lower left in "Cloud View," can lend additional insight and direction for marketing strategies and campaign messages that leverage existing assets and resonate with the Downtown Foley audience.

Directions

Design

- ▶ Work with the Promotion Committee to incorporate the to-be-developed Downtown Foley branding system's graphics and elements in streetscape furnishings, seasonal and holiday banners and décor, wayfinding signage, interpretive elements, etc.

Promotion

- ▶ Work with Main Street Alabama to develop and implement a complete Downtown Foley branding system that includes logos, event graphics, corporate collaterals, signage, banner and decal examples, etc.
- ▶ Work in concert with downtown businesses and community organizations to develop and deploy a customer-driven testimonial campaign that captures faces, images and quotes focused on the things local residents like most about Downtown Foley—people, places and experiences that highlight the community-oriented nature of downtown businesses, extraordinary customer service experiences, special features, favorite memories, and progress being made as part of the community's downtown revitalization initiative.

Potential Activities

- (D) Integrate branding extensions in the public realm
- (P) Downtown stock photo library as marketing resource
- (P) FMS and Downtown Foley branding system
- (P) Customer-driven testimonial campaign

(D) Design (E) Economic Vitality (O) Organization (P) Promotion

BUSINESS INSIGHTS AND DIRECTIONS

Inside the Data

The Downtown Foley Business Survey was completed by 61 participants operating in six business sectors.

Table 15

Q: Which of the following best describes your primary business type?

Responses

Retail	26.2%
Service	21.3%
Eating and Drinking Places	18.0%
Professional/Office	24.6%
Others	9.8%

Source: 2019 Downtown Foley Business Survey.

Business Tenure

30% Of businesses surveyed, 30.4% have been located downtown for **21 years or longer**.

Source: 2019 Downtown Foley Business Survey.

Table 16

Q: How long has your business been located in Downtown Foley?

Responses

Less than 1 year	10.7%
1 to 4 years	23.2%
5 to 9 years	10.7%
10 to 20 years	25.0%
21+ years	30.4%

Source: 2019 Downtown Foley Business Survey.

Table 17

Q: Do you own or rent your business location?

Responses

Own	37.7%
Rent	62.3%

Source: 2019 Downtown Foley Business Survey.



Insights

- The downtown business climate appears to be conducive to business start-up and entrepreneurial activity, as evidenced by 34% of the business survey sample indicating they have been located in Downtown Foley for four years or less.
- At the other end of the spectrum, 30% of businesses surveyed indicated their business has been located in Downtown Foley for twenty-one years or longer. The figure can be viewed as an indicator of stability in the downtown business mix, but it could also signal a possible need for business succession planning.
- Succession planning needs for Downtown Foley might also involve a real estate transaction given 38% of the survey's participants identified themselves as property/business owner-occupants.

Directions

Economic Vitality

- Foley Main Street and community partners should work to identify, promote and facilitate access to partners, resources and technical assistance available for business succession planning.
- Use the proposed business visitation program, roundtables and other networking opportunities and events to share information on business succession planning resources and contacts.

Potential Activities

- (E) Business visits and roundtables > succession planning
- (E) Business succession planning resources referral sheet

(D) Design (E) Economic Vitality (O) Organization (P) Promotion

BUSINESS INSIGHTS AND DIRECTIONS

Changes in the Making?

Business survey results provide insight on the nature and scope of possible changes that could occur in the downtown area within the next two years.

54%

Of businesses surveyed plan to **expand services or product lines**.

Source: 2019 Downtown Foley Business Survey.

Table 18

Q: In the next year or two, do you plan to change or modify your business in any of the following ways?

Expand services or product lines	53.8%
Start and/or complete building improvements	40.4%
Increase marketing	40.4%
Increase number of employees	38.5%
Expand hours of operation	25.0%

Source: 2019 Downtown Foley Business Survey. Most frequent responses shown.

Business Support Opportunities

Businesses surveyed showed higher levels of interest in marketing, social media and customer attraction training topics; and in Opportunity Zone, Cooperative District and Façade Grant programs.

Table 19

Q: Of the following business seminar topics, which two would be of most interest and/or most useful to you?

Marketing for Small Businesses	51.9%
Social Media and eCommerce	50.0%
How to Increase Foot Traffic	38.9%
Customer Service and Customer Retention	24.1%
Small Business Management 101	14.8%

Table 20

Q: Indicate which of the following programs you are familiar with, and those for which you would like more information?

Programs	Familiar	Want Info
Opportunity Zones	13.1%	41.0%
Cooperative Districts	18.0%	34.4%
Façade Grants	36.1%	27.9%
Design Services	19.7%	26.2%
Hospitality Training	32.8%	23.0%
Workforce Development	29.5%	19.7%

Source: 2019 Downtown Foley Business Survey. Most

Insights

- ▶ The nature of changes and interests expressed by the business survey group suggests the timing could be opportune for Foley Main Street to:
 - Share findings on business types, products and services that could offer opportunities for expansion.
 - Target design assistance and incentives or component grants for facade, signage and other improvements at quality projects that will set the bar high for future projects.
 - Engage the downtown business community in collaborative marketing efforts.

Directions

Design

- ▶ Work with Main Street Alabama and local design professionals and partners to:
 - Explore resources and promote options for targeted design assistance and technical training services.
 - Organize and facilitate “Code Team” pre-project walk-throughs involving Design Committee members, building owners, building officials, and other relevant personnel to assess and troubleshoot property improvement requirements and challenges, and to help map out the step-by-step process that will be required for each project.

Economic Vitality

- ▶ Share market study findings on product lines showing potential for expansion.
- ▶ Further explore interest for training, and preferred training delivery methods or formats, in the marketing, social media and customer attraction & retention topics; and work with Main Street Alabama and area partners to identify, promote and facilitate training opportunities.
- ▶ Disseminate information on programs for which survey respondents indicated a desire for more information, such as Opportunity Zones, Cooperative Districts, Façade Grants and Design Services.
- ▶ Work with property owners and realtors to inventory and promote business and investment opportunities via social media, an “Opportunity Knocks” campaign, etc.

Potential Activities

- (D) Promote resources for building improvements
- (E) Facilitate Code Team pre-project walk-throughs
- (E) Business visits & roundtables > expansion opportunities
- (E) Business training and programs info dissemination
- (E) Promote business & property investment opportunities
- (D) Design (E) Economic Vitality (O) Organization (P) Promotion

BUSINESS INSIGHTS AND DIRECTIONS

Benchmarks and Tracking

Data collected and compiled as part of the business survey provides valuable insights on the Downtown Foley business environment today and, in some cases, can be used to benchmark, track and measure changes and progress stemming from downtown enhancement initiatives. The information will also be valuable to prospective businesses, investors, developers, and entrepreneurs as they consider opportunities.

41%

Of businesses surveyed reported a 2018 increase in gross sales or revenues.

Source: 2019 Downtown Foley Business Survey.

Table 21

Q: Which of the following describes the change in your business' gross sales or revenues in 2018 as compared to 2017? (If unsure, use your best estimate)

Responses

Increased by 1% to 5%	16.7%
Increased by 6% to 10%	7.4%
Increased by 11% or more	16.7%
Decreased by 1% to 5%	9.3%
Decreased by 6% to 10%	3.7%
Decreased by 11% or more	5.6%
Stayed about the same	25.9%
Not in business in 2017	14.8%

69%

Of businesses surveyed expect gross sales or revenues to increase in 2019.

Source: 2019 Downtown Foley Consumer Survey.

Table 22

Q: In your best estimation, how do you expect your gross sales or revenues to change in 2019 as compared to 2018?

Responses

Increase by 1% to 5%	24.5%
Increase by 6% to 10%	32.1%
Increase by 11% or more	13.2%
Decrease by 1% to 5%	5.7%
Decrease by 6% to 10%	0.0%
Decrease by 11% or more	1.9%
Stay about the same	17.0%
Not in business in 2018	5.7%

Source: 2019 Downtown Foley Business Survey.

Insights

- ▶ Year-to-year increases in gross sales or revenues for 2018 reported by 41% of the business survey group, along with an optimistic outlook for continued increases in 2019 expressed by 69% of those surveyed, are consistent with upward trends and perspectives shared by the business survey group.
- ▶ Information on year-to-year sales and revenues is just one example of data and statistics that should be benchmarked and tracked on a consistent basis. Other information tracked on a regular basis by Foley Main Street (i.e. new businesses, new jobs, public and private investment, etc.) will be highly valuable in making the case for new and ongoing downtown revitalization initiatives, and for marketing—and demonstrating—opportunities for prospective businesses, investors, developers, and entrepreneurs.

Directions

Economic Vitality

- ▶ Repeat the business survey on an annual or biennial basis to track economic conditions and business trends, and to identify the needs of downtown businesses.
- ▶ Incorporate relevant tracking data into messaging and materials promoting downtown business and investment opportunities.

Organization

- ▶ Augment market study data with statistics and tracking data reported monthly to Main Street Alabama, along with other locally selected tracking measures that might be more unique to Foley Main Street and the Foley downtown district, to measure progress, build support for new and ongoing revitalization initiatives, and promote opportunities.
- ▶ Incorporate relevant tracking data in messaging and materials promoting the Foley Main Street organization, its mission, and opportunities to invest in, and participate with, the organization.

Promotion

- ▶ Benchmark and track attendance estimates for downtown events to measure appeal and return on investment, and to incorporate into business recruitment messaging and materials.

Potential Activities

- (E) Conduct business survey on annual or biennial basis
- (E) Fact sheet(s) for business attraction w/ tracking data
- (O) Annual report w/ tracking data and progress updates
- (P) Event attendance benchmarking and tracking
- (D) Design (E) Economic Vitality (O) Organization (P) Promotion

TARGETS

Eating and Drinking Establishments | Top 5 Profiles

Beyond identifying consumer preferences for new and expanded types of eating and drinking establishments, a breakdown of survey demographics by selection offers a starting point to better understanding and profiling the potential target market for different models, and the viability of different concepts with respect to price points, menu options, marketing and advertising strategies, merchandising, décor, and other important business considerations.

Following is a thumbnail profile—or the potential target market—for each of the five highest ranked prospects for eating and drinking establishments based on results of the consumer survey.

Bakery

Consumer Survey Percent (Ranking):			48.4% (1)		
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	74%	(70%)	Female	80%	(74%)
Within 20 Miles	24%	(26%)	Male	17%	(24%)
More than 20 Miles	2%	(4%)			
HH Income:	Pct.	*	Age:	Pct.	*
< \$50K	25%	(26%)	< 24	6%	(6%)
\$50K to \$99K	41%	(40%)	25 to 34	15%	(10%)
\$100K to \$149K	23%	(22%)	35 to 44	20%	(16%)
\$150 to \$199K	5%	(7%)	45 to 54	27%	(20%)
\$200K+	6%	(5%)	55 to 64	20%	(23%)
			65+	4%	(27%)

Breakfast/Brunch Restaurant

Consumer Survey Percent (Ranking):			46.9% (2)		
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	74%	(70%)	Female	73%	(74%)
Within 20 Miles	21%	(26%)	Male	25%	(24%)
More than 20 Miles	5%	(4%)			
HH Income:	Pct.	*	Age:	Pct.	*
< \$50K	23%	(26%)	< 24	7%	(6%)
\$50K to \$99K	43%	(40%)	25 to 34	13%	(10%)
\$100K to \$149K	19%	(22%)	35 to 44	15%	(16%)
\$150 to \$199K	11%	(7%)	45 to 54	19%	(20%)
\$200K+	4%	(5%)	55 to 64	18%	(23%)
			65+	28%	(27%)

Source: 2019 Downtown Foley Consumer Survey | * Overall survey sample shown in parentheses



Opportunities Ahead?

Table 23

Q: Which of the following types of eating and drinking establishments would make you visit Downtown Foley more often?

Top Consumer Survey Responses

Bakery	48.4%
Breakfast/Brunch Restaurant	46.9%
Steakhouse	43.2%
Deli/Sandwich Shop	43.0%
Brewery or Brewpub	42.2%
Upscale Dining	31.0%
Meat & Three Restaurant	24.7%
Mexican Restaurant	24.7%
Healthy Menu Eatery	23.7%
Seafood Restaurant	23.0%
Italian Restaurant or Pizzeria	22.2%
Asian Restaurant	14.8%
Coffee Shop	14.2%
Ice Cream & Sweets Shop	9.0%

Source: 2019 Downtown Foley Consumer Survey.

40%

Of all **Business Survey** responses cited **eating and drinking** uses when asked, "What type of new businesses or attractions, located in Downtown Foley, would help your business and/or have the best chance to succeed."

Source: 2019 Downtown Foley Business Survey.

TARGETS

Eating and Drinking Establishments | Top 5 Profiles

Steakhouse

Consumer Survey Percent (Ranking):		43.2% (3)			
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	76%	(70%)	Female	67%	(74%)
Within 20 Miles	22%	(26%)	Male	29%	(24%)
More than 20 Miles	2%	(4%)			
			Age:	Pct.	*
HH Income:	Pct.	*	< 24	4%	(6%)
< \$50K	25%	(26%)	25 to 34	7%	(10%)
\$50K to \$99K	35%	(40%)	35 to 44	17%	(16%)
\$100K to \$149K	26%	(22%)	45 to 54	22%	(20%)
\$150 to \$199K	8%	(7%)	55 to 64	24%	(23%)
\$200K+	6%	(5%)	65+	27%	(27%)

Deli/Sandwich Shop

Consumer Survey Percent (Ranking):		43.0% (4)			
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	71%	(70%)	Female	81%	(74%)
Within 20 Miles	25%	(26%)	Male	18%	(24%)
More than 20 Miles	4%	(4%)			
			Age:	Pct.	*
HH Income:	Pct.	*	< 24	5%	(6%)
< \$50K	23%	(26%)	25 to 34	12%	(10%)
\$50K to \$99K	47%	(40%)	35 to 44	22%	(16%)
\$100K to \$149K	20%	(22%)	45 to 54	23%	(20%)
\$150 to \$199K	5%	(7%)	55 to 64	18%	(23%)
\$200K+	6%	(5%)	65+	20%	(27%)

Brewery or Brewpub

Consumer Survey Percent (Ranking):		42.2% (5)			
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	69%	(70%)	Female	76%	(74%)
Within 20 Miles	29%	(26%)	Male	22%	(24%)
More than 20 Miles	3%	(4%)			
			Age:	Pct.	*
HH Income:	Pct.	*	< 24	1%	(6%)
< \$50K	17%	(26%)	25 to 34	20%	(10%)
\$50K to \$99K	41%	(40%)	35 to 44	23%	(16%)
\$100K to \$149K	25%	(22%)	45 to 54	22%	(20%)
\$150 to \$199K	11%	(7%)	55 to 64	22%	(23%)
\$200K+	6%	(5%)	65+	12%	(27%)

Source: 2019 Downtown Foley Consumer Survey | * Overall survey sample shown in parentheses



Different eating and drinking establishment models and concepts could incorporate one or more of the genres sampled in the consumer survey, and might also serve to address and benefit from an expressed desire on the part of survey respondents for additional recreation and entertainment in the downtown area. For example, a deli/sandwich shop concept might also incorporate soup, salad, wrap selections and promote healthy menu items; and the setting might provide for a children's play area, a student study bar and periodic entertainment spilling into the evening hours.

Additional opportunities and concepts for both existing and new eating and drinking establishments might include menu options not currently offered in the downtown area; and the incorporation of various forms of entertainment, display or demonstration kitchens, tasting areas and events, and outdoor seating. Evening and nighttime establishments, in particular, might feature various genres of music and venues for local artists and storytellers to enhance the downtown's "fun & entertainment factor" - and to heighten appeal among the visitor and seasonal resident markets. Décor and themes might feature local art, history, culture and characters.

Note: The eating and drinking establishment targets described here should serve as a starting point. Main Street Foley, downtown stakeholders, and community partners should infuse local knowledge and expertise into the process of analyzing market information to further develop profiles for business types and concepts that are a good fit for downtown, and that appear to have the very best chance to succeed. This will be an ongoing process, and the list of targets should be continuously reviewed, updated, and refined over time, and as conditions change.

TARGETS

Retail Establishments | Top 5 Profiles

Like the profiles created for top consumer survey-ranked eating and drinking establishments, profiles for top scoring retail establishments provide a starting point for better understanding local preferences—and potential target markets and the viability of different concepts with respect to price points, product and service lines, marketing and merchandising strategies, and other important business considerations.

Following is a thumbnail profile—or the potential target market—for each of the five highest ranked prospects for retail establishments based on results of the consumer survey.

Bakery

Consumer Survey Percent (Ranking):		59.6% (1)	
Residence:	Pct. *	Gender:	Pct. *
Foley Resident	77% (70%)	Female	76% (74%)
Within 20 Miles	20% (26%)	Male	23% (24%)
More than 20 Miles	3% (4%)		
HH Income:	Pct. *	Age:	Pct. *
< \$50K	22% (26%)	< 24	3% (6%)
\$50K to \$99K	46% (40%)	25 to 34	9% (10%)
\$100K to \$149K	19% (22%)	35 to 44	15% (16%)
\$150 to \$199K	7% (7%)	45 to 54	21% (20%)
\$200K+	6% (5%)	55 to 64	24% (23%)
		65+	28% (27%)

Specialty Foods & Wines

Consumer Survey Percent (Ranking):		57.6% (2)	
Residence:	Pct. *	Gender:	Pct. *
Foley Resident	72% (70%)	Female	78% (74%)
Within 20 Miles	25% (26%)	Male	21% (24%)
More than 20 Miles	3% (4%)		
HH Income:	Pct. *	Age:	Pct. *
< \$50K	20% (26%)	< 24	1% (6%)
\$50K to \$99K	40% (40%)	25 to 34	12% (10%)
\$100K to \$149K	24% (22%)	35 to 44	21% (16%)
\$150 to \$199K	10% (7%)	45 to 54	20% (20%)
\$200K+	5% (5%)	55 to 64	24% (23%)
		65+	21% (27%)

Source: 2019 Downtown Foley Consumer Survey | * Overall survey sample shown in parentheses



Top Retail Candidates?

Table 24

Q: Which of the following types of retail establishments would make you visit Downtown Foley more often?

Top Consumer Survey Responses	
Bakery	59.6%
Specialty Foods & Wines	57.6%
Women's Clothing	50.2%
Home Furnishings & Gifts	37.3%
Arts, Crafts and Hobbies	35.2%
General/Variety/Hardware Store	25.5%
Bookstore	24.5%
Sporting Goods/Outdoors	21.2%
Health and Beauty	17.0%
Antiques	16.8%
Children's Clothing	12.4%
Men's Clothing	10.5%
Toys	6.8%
Bike & Bike Repairs Shop	3.7%

Source: 2019 Downtown Foley Consumer Survey.

25%

Of all **Business Survey** responses cited **retail** uses when asked, "What type of new businesses or attractions, located in Downtown Foley, would help your business and/or have the best chance to succeed."

Source: 2019 Downtown Foley Business Survey.

TARGETS

Retail Establishments | Top 5 Profiles

Women's Clothing

Consumer Survey Percent (Ranking):			50.2% (3)		
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	65%	(70%)	Female	96%	(74%)
Within 20 Miles	32%	(26%)	Male	3%	(24%)
More than 20 Miles	3%	(4%)			
HH Income:	Pct.	*	Age:	Pct.	*
< \$50K	21%	(26%)	< 24	7%	(6%)
\$50K to \$99K	37%	(40%)	25 to 34	12%	(10%)
\$100K to \$149K	26%	(22%)	35 to 44	14%	(16%)
\$150 to \$199K	7%	(7%)	45 to 54	22%	(20%)
\$200K+	8%	(5%)	55 to 64	22%	(23%)
			65+	22%	(27%)

Home Furnishings & Gifts

Consumer Survey Percent (Ranking):			37.3% (4)		
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	69%	(70%)	Female	87%	(74%)
Within 20 Miles	26%	(26%)	Male	11%	(24%)
More than 20 Miles	5%	(4%)			
HH Income:	Pct.	*	Age:	Pct.	*
< \$50K	21%	(26%)	< 24	3%	(6%)
\$50K to \$99K	42%	(40%)	25 to 34	14%	(10%)
\$100K to \$149K	23%	(22%)	35 to 44	13%	(16%)
\$150 to \$199K	6%	(7%)	45 to 54	16%	(20%)
\$200K+	7%	(5%)	55 to 64	27%	(23%)
			65+	27%	(27%)

Arts, Crafts and Hobbies

Consumer Survey Percent (Ranking):			35.2% (5)		
Residence:	Pct.	*	Gender:	Pct.	*
Foley Resident	71%	(70%)	Female	75%	(74%)
Within 20 Miles	24%	(26%)	Male	22%	(24%)
More than 20 Miles	4%	(4%)			
HH Income:	Pct.	*	Age:	Pct.	*
< \$50K	33%	(26%)	< 24	6%	(6%)
\$50K to \$99K	38%	(40%)	25 to 34	11%	(10%)
\$100K to \$149K	22%	(22%)	35 to 44	14%	(16%)
\$150 to \$199K	4%	(7%)	45 to 54	22%	(20%)
\$200K+	3%	(5%)	55 to 64	25%	(23%)
			65+	22%	(27%)

Source: 2019 Downtown Foley Consumer Survey | * Overall survey sample shown in parentheses



Survey results could provide inspiration for crossover concepts; and for existing downtown businesses to reposition themselves in the market, to introduce complementary products and services, or to expand. For example, select crossover lines from the cards and gifts, home furnishings and health and beauty categories could be packaged together in a single space, or could offer existing businesses opportunities to add complementary product lines from these categories. Certain lines might also be conducive to Pop-up Shop and kiosk-style models, or might start as festival booths in order to experiment with and test-market various concepts, models and product lines.

Note: The retail establishment targets described here should serve as a starting point. Main Street Foley, downtown stakeholders, and community partners should infuse local knowledge and expertise into the process of analyzing market information to further develop profiles for business types and concepts that are a good fit for downtown, and that appear to have the very best chance to succeed. This will be an ongoing process, and the list of targets should be continuously reviewed, updated, and refined over time, and as conditions change.

TARGETS

Office and Service Uses

National trends depicting a transition to a more service-oriented society, along with prominent civic, government, office, and service uses already present in Downtown Foley, suggest demand for space to accommodate these types of uses in the downtown area could increase in the future. Other trends and factors that could influence the market include:

- ▶ Potential for existing Downtown Foley non-retail uses, office tenants and service providers to expand beyond their existing space or footprint.
- ▶ The possibility that existing office and service uses currently located in other parts of the community and region will seek to relocate in Downtown Foley, especially as the community's downtown enhancement initiatives progress.

The importance of, and opportunities for, new and expanding office and service uses in the downtown may best be demonstrated by:

- ▶ Fifty-three percent of consumer survey respondents indicated they visit Downtown Foley on a daily or weekly basis to do errands or for office and service-related purposes.
- ▶ The location of prominent public and civic facilities in the midst of downtown makes the area a prime location for office and service providers providing legal and other government-related services.
- ▶ Business survey results that show 17% of all suggestions for new businesses or attractions pertained to service and office uses—one of the most frequently cited categories.
- ▶ The downtown's existing and evolving business mix is conducive to personal care and service uses, including services that cater to year-round and seasonal residents and visitors.
- ▶ Interest expressed on the part of consumers in new housing that could be developed in the downtown area.

Office, service, government and civic uses in Downtown Foley have always played an important role in generating traffic to support the district's economy and sense of vitality. Predictably, office and service uses will continue to be important to the downtown area in the future. These uses should continue to be encouraged to locate in the downtown area and, where appropriate and applicable, Foley Main Street and community development partners should work to locate these uses in buildings, spaces, and redevelopment sites that are conducive to creating and maintaining a strong sense of retail vibrancy throughout the downtown area.



Office, service, government and civic uses in Downtown Foley have always played an important role in generating traffic to support the district's economy and sense of vitality.

Table 25

Q: How often do you visit Downtown Foley...

Frequency—Daily or Weekly	Percent
To do errands or for office and service-related purposes?	52.6%
For eating, drinking and/or entertainment?	24.5%
To shop?	14.2%

Source: 2019 Downtown Foley Consumer Survey.

TARGETS

Housing Opportunities

Consumers surveyed showed strong interest in downtown housing. The results could lend support for the rehabilitation and development of a variety of housing styles in the Downtown Foley area.

46%

Of consumers surveyed reported said “Yes” or “Maybe” when asked, “Would you consider living in Downtown Foley?”

Source: 2019 Downtown Foley Consumer Survey.

Table 26

Q: Would you consider living in Downtown Foley?

Yes	18.2%
Maybe	28.2%

Table 27

Q: Would you prefer to own or rent housing in Downtown

Own	72.0%
Rent	28.0%

Table 28

Q: What style of housing in Downtown Foley would you look

Townhouse	48.7%
Loft	43.5%
Condo	39.7%
Senior Housing	23.9%
Apartment	22.6%

Table 29

Q: What is the monthly mortgage payment or rent amount you would be willing to pay for your choice of downtown housing?

Less than \$600	7.6%
\$600 to \$799	25.8%
\$800 to \$999	33.4%
\$1,000 to \$1,199	19.4%
\$1,200 to \$1,399	9.9%
\$1,400 to \$1,499	2.5%
\$1,500 or more	1.3%

Source: 2019 Downtown Foley Consumer Survey.



Example: Potential downtown housing.

Insights

- ▶ Comparatively strong levels of interest expressed by the consumer survey group bode well for the potential rehabilitation and development of various styles of housing in the downtown area.
- ▶ The benefits of housing in a downtown district are multifold and align with strategies envisioning a traditional downtown or neighborhood commercial district as the center of community life.
- ▶ Possibilities for downtown housing could include a range of housing styles and price points catering to all walks of life and life stages including:
 - The rehabilitation of vacant and underutilized upper levels of existing downtown buildings for a range of housing styles, such as apartments, lofts, and live-work units, appealing to different segments of the market.
 - Mixed use development at potential downtown redevelopment sites.
 - The development of urban housing styles (i.e. row homes, town homes, etc.) at appropriate sites in areas immediately surrounding the core downtown district.

TARGETS

Housing Opportunities

A breakdown of survey demographics for those indicating an interest in downtown housing points to possibilities for a range of housing styles and price points catering to all walks of life and life stages.

Table 30

Potential Downtown Housing Market Demo Profile

Age	Percent
24 or younger	15.7%
25 to 34	17.4%
35 to 44	26.7%
45 to 54	25.0%
55 to 64	10.5%
65 or older	4.7%

Household Size	Percent
1	5.8%
2	27.3%
3	21.5%
4 or more	45.3%

Household Income	Percent
Less than \$25,000	14.0%
\$25,000 to \$49,999	18.1%
\$50,000 to \$74,999	23.4%
\$75,000 to \$99,999	19.9%
\$100,000 to \$149,999	15.8%
\$150,000 and greater	8.8%

Source: 2019 Downtown Foley Consumer Survey. Profile based on demographic characteristics of 316 survey respondents who answered "yes" or "maybe" when asked, "Would you consider living in Downtown Foley?"



Example: Potential downtown housing.

Directions and Actions

Design

- Facilitate "Code Team" pre-project walk-throughs involving Design Committee members, building owners, building officials, and other relevant personnel to assess and troubleshoot potential challenges to the rehabilitation and development of downtown housing, especially as they may apply to the upper levels of existing downtown structures.

Economic Vitality

- Work with local government and community development and housing interests to further explore feasibility and identify possible programs, technical assistance, and resources that might be appropriate to downtown housing development goals.

Promotion

- Host an annual "At Home Downtown" or "Living it Up Downtown" event to showcase downtown area housing units in the before, during, and after phases of rehabilitation or development.

Potential Activities

- (D) Facilitate "Code Team" walk-throughs for upper levels
- (E) Inventory downtown housing units (existing & potential)
- (E) Identify and promote housing development resources
- (P) Downtown housing showcase tours

(D) Design (E) Economic Vitality (O) Organization (P) Promotion

MOVING FORWARD

Strategies, Projects and Activities

Activities proposed in this document and displayed in an “at-a-glance” format on the following page serve as a good starting point and guide for moving forward. Other ideas and activities are likely to grow out of this study’s findings and those already contained in the 2018 Main Street Alabama Resource Team Report (a companion document to this study), Foley Main Street work plans, and other planning documents. To that end, the ultimate selection and implementation of activities must also consider the organization’s capacity to take on new projects, with an understanding that implementation, and change, will occur over a period of time.

Supporting and Sustaining Activities

The ability to move forward on the ideas and opportunities advanced as part of this study, along with those already in motion or contained in other planning documents, will also hinge on a strong organizational foundation and supporting activities that, while not explicitly spelled out within the context of any market study, are absolutely essential to the success of Foley Main Street and the community’s downtown revitalization efforts.

Foley Main Street’s role as partnership builder, resource locator, and publicity machine will become even more important in the months and years ahead. In some cases this role may require the organization to locate or develop entirely new sources of funding to execute a new project, or to find a new volunteer source to ensure that a new festival or event is adequately staffed. In other cases, it might require the organization to re-assess priorities and existing budget allocations as priorities may shift based on the findings of this study and other planning efforts, as new opportunities emerge, and conditions change in the future.



Examples: Supporting and Sustaining Activities

Board of Directors/Organization

- Fundraising and fund development activities to sustain the organization and implement projects and activities.
- Volunteer development activities including the recruitment, retention, and recognition of volunteers.
- Partnership and public participation efforts to involve a cross section of residents, business persons, elected officials, community leaders, and representatives from other community organizations.
- Monitoring and tracking progress, evaluating processes, measuring results, and taking appropriate action, where and when necessary, to refine operations or implement changes.
- Public relations to enhance awareness of the Foley Main Street organization and the importance of its work to the community, and to publicize plans, projects and results.
- Monitoring and evaluating executive staff performance, needs for support staff, and budgeting accordingly.
- Leadership development, including the allocation of sufficient funds for board member, staff and volunteer leadership development and training.

Economic Vitality

- Building/Business Inventory to track occupancy, identify underutilized space, benchmark and track property values, develop a contacts database for building and business owners, create and update a downtown business directory, etc.
- “Hotlist” of downtown properties and spaces available for sale or lease to help facilitate matches between property owners/agents and prospective businesses, investors, developers and entrepreneurs.
- Business Resources Guide/Directory to help facilitate access to technical assistance and resources, to help prospects navigate development and permitting processes, etc.

MOVING FORWARD

At-a-Glance: Downtown Foley Market Study and Strategies | Potential Activities

Economic Vitality Potential Activities

Ref	Potential Economic Vitality Activities	Pg.
1	Building/Business inventory (w/ regular updates)	5
2	Visitor/Seasonal Resident intercept surveys	6
3	Share consumer media preferences with businesses	7
4	Promote downtown as a “good investment”	8
5	Business visits and roundtables to share survey results	9
6	Vacant property visits to identify targeted uses	9
7	Vacant property poster/storefront treatment program	9
8	Publicize survey results and a list of “top prospects”	9
9	Incentives for buildings and new/expanding businesses	10
10	Business assistance resources guide/directory	10
11	Business succession planning visits and roundtables	12
12	Business succession planning resources referral sheet	12
13	Business expansion opportunities visits and roundtables	13
14	Business training and programs info dissemination	13
15	Promote business & property investment opportunities	13
16	Conduct business survey on annual or biennial basis	14
17	Fact sheet(s) for business attraction w/ tracking data	14
18	Inventory downtown housing units (existing & potential)	21
19	Identify and promote housing development resources	21
20		

Design Potential Activities

Ref	Potential Economic Vitality Activities	Pg.
1	Downtown pedestrian wayfinding signage/features	6
2	Placemaking activities focused on fun and “stickability”	8
3	Integrate branding extensions in the public realm	11
4	Promote resources for building improvements	13
5	Facilitate “Code Team” pre-project walk-throughs	13
6	“Code Team” walk-throughs for upper levels	21
7		
8		
9		
10		

Promotion Potential Activities

Ref	Potential Economic Vitality Activities	Pg.
1	Encourage/Facilitate cross-promotion efforts	5
2	Regular (weekly?) FB Business Highlight/Focus posts	5
3	Downtown Businesses & Services Directory	5
4	Promote hospitality training to increase referrals	5
5	Downtown promo displays/materials at anchors	6
6	Develop a framework for collaborative marketing	7
7	Family events (i.e. ice cream socials, street dance, etc.)	8
8	Event test market opportunities (i.e. booths, Pop-ups)	8
9	Engage businesses to evaluate events (i.e. post-survey)	10
10	Downtown stock photo library as marketing resource	11
11	FMS and Downtown Foley branding system	11
12	Customer-driven testimonial campaign	11
13	Event attendance benchmarking and tracking	14
14	Downtown housing showcase tours	21
15		
16		
17		
18		
19		
20		

Organization Potential Activities

Ref	Potential Economic Vitality Activities	Pg.
1	Presentations/updates to partners & community groups	5
2	MSS info displays and meet & greet events at anchors	6
3	Continue to employ Facebook as a core platform	7
4	Expand social media presence to other applications	7
5	Annual report with tracking data and progress updates	14
6		
7		
8		
9		
10		

MOVING FORWARD

Next Step: Transformation Strategies

The information, insights, directions and potential activities emanating from the Market Study and Strategies process provide solid groundwork for the design and execution of a holistic, market-driven revitalization strategy. Still, it will be important to maintain focus on the ultimate vision for Downtown Foley and to prioritize efforts, accordingly.

Main Street Alabama's Transformation Strategies Development Service—the next step in the process—infuses locally-mined information and directions posed by the market study to help communities fine-tune strategies and prioritize projects and activities that incrementally create positive changes in the district's economy.

The Main Street Approach to Revitalization

Main Street Alabama works with member communities and organizations to adapt a time-tested and proven approach to revitalization developed and promoted by Main Street America™, a program of the National Main Street Center. The approach provides a framework for communities to rebuild, preserve, and reinvigorate their historic and older downtowns and neighborhood commercial districts.

The Main Street Approach® consists of three essential and tightly integrated tools:

1. **Community Vision** that is informed by broad and inclusive community input *and* market understanding.
2. **Transformation Strategies** that incrementally create positive changes in the district's economy. These are implemented through simultaneous activity in four broad areas of work that, together, constitute the "Four Points." In brief:
 - ♦ **Design** encompasses improving all the physical and visual aspects of the district.
 - ♦ **Organization** involves cultivating partnerships and resources for the district.
 - ♦ **Promotion** is about marketing the district.
 - ♦ **Economic Vitality** focuses on capital, incentives and other economic and financial tools for business and property development.
3. **Impact measurement** includes monitoring quantitative and qualitative outcomes.



© National Main Street Center, 2016, All Rights Reserved.

Transformation Strategies Explained

A *Transformation Strategy* articulates a focused, deliberate path to revitalizing or strengthening a downtown or commercial district's economy. Grounded by both an understanding of the underlying drivers of the local and regional economy, as well as community feedback and engagement, a Transformation Strategy should describe a market position that the commercial district can successfully fulfill.

An effective Transformation Strategy serves a particular customer segment, responds to an underserved market demand, or creates a differentiated destination.

Simply stated, a *Transformation Strategy* is a comprehensive strategy that guides the direction of the revitalization initiative and, over time, transforms the district. Each Transformation Strategy has several important characteristics:

- ▶ It is **rooted in the community's vision** for the district.
- ▶ It is **based on a solid analysis and understanding** of the district's economy and its best economic opportunities.
- ▶ It is **comprehensive**, in that it is implemented through a broad range of activities that span the four broad areas of work represented by the Four Points.
- ▶ It is **measurable**, making it possible to track progress.
- ▶ It **provides guidance for program activities for a two- to five-year period**, after which the revitalization program should examine progress and make adjustments, as needed.

In general, a revitalization organization should work with one or two Transformation Strategies at a time. In some exceptional circumstances, it might consider tackling three Transformation Strategies—but more than three would be challenging.