

EXECUTIVE SUMMARY

OVERVIEW

As demonstrated within the primary report, Olde Englewood Village is not positioned to compete with the "normal" retail market,¹ and it is not the intent of the Olde Englewood Association or the Englewood CRA to develop Dearborn Street as a shopping center or a strip mall. Rather, the intent is to develop the area as an historic "village," which is envisioned as a mixed-use destination featuring entertainment and retail activities at ground level and residential and/or office space above.

While traditional retail analysis shows that the overall region is "over retailed," SPG took a proactive demand approach to determine whether Olde Englewood Village and environs have, or could have, the resources necessary to become an "end destination." A proactive approach is used by developers who wish to create a product that does not exist within the market, thus historic demand figures are not entirely relevant. The concept is to determine the desired amount of entertainment/retail/mixed-use space, and then determine what level of demand would be required to fill that mix of space. What steps would be required to attract that demand would then be determined. This proactive demand approach was used in the study to develop the appropriate feasibility for the redevelopment of Olde Englewood Village

END DESTINATION ATTRACTION

To become a destination implies that the area itself becomes an "anchor" or major attraction.² In a retailing or tourist orientation, numerous attributes can be defined that could cause a specific geographic area to become an anchor:

- beaches or beach resorts,
- aquariums/museums,
- collection of theatres (e.g., Branson, MO),
- off-price malls (discount outlets),
- concentration of shopping,
- ski resorts, and
- entertainment districts.

Destination entertainment/retail development by concept is dependent upon strong spending demographics and appeals to the need for public facilities and gathering places. The more successful developments create a sense of community with attractive pedestrian ways, public space and plazas, outdoor café seating, and distinctive façade design. They have more restaurants than is typical, along with a higher proportion of leisure activities and retailing, such as bookstores, electronics, bath shops and children's stores.

Olde Englewood is not geographically located along major transportation corridors supporting a regional market nor does it have significant vacant lands (or significant vacant buildings) to allow for the development of a single-end destination entertainment/retail attraction. Therefore, attractors other than retail need to be the activity anchors for the redevelopment program.

¹ Other than property directly on State Road 776, the bulk of the land is not visible to the main transportation corridor nor are the properties located nearer Lemon Bay accessible in the timely fashion now required for most retailers.

² As department stores are "anchors" for regional malls drawing most of the customer base of the mall.

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Assuming that Olde Englewood Village could position itself as a destination, the question is how many customers/patrons would be required to fill an initial 150,000 to 200,000 square feet of destination retail space. SPG feels this is the minimum square footage necessary to create a critical mass to support retail activities that will keep visitors/shoppers returning to the village on a regular basis.

Table 1 shows one potential mix of store types within a 150,000 square foot downtown retail destination of 54 stores, and another mix of 74 stores in a 200,000 square foot destination.

Table 1. Potential Mix in Retail Destination

Description	%	150,000	Stores	200,000	Stores
Antiques/Collectibles	9%	12,628	5	17,138	7
Art Galleries	10%	13,638	8	18,509	10
Books	9%	12,628	1	17,138	2
Clubs/Entertainment	6%	8,419	2	11,425	3
Furniture/Interior Design	2%	3,157	2	4,284	3
Hardware	3%	4,209	0	5,713	1
Jewelry	2%	3,157	2	4,284	3
Pet	7%	10,102	1	13,710	2
Liquor/Wine	2%	2,946	1	3,999	1
Restaurants/Deli/Bars	18%	25,256	8	34,275	11
Salons/Day Spas/Barbers	6%	8,208	5	11,140	7
Services	3%	3,788	3	5,141	3
Specialty Gift/Craft	10%	14,396	8	19,537	11
Sporting Goods/Eco Sport	1%	1,473	0	1,999	1
Toys	3%	4,420	1	5,998	2
Apparel (Men's & Women's)	8%	11,575	5	15,710	6
Performing Arts		10,000	1	10,000	1
	100%	150,000	54	200,000	74

Source: Strategic Planning Group, Inc. 2006

Note: the mix of stores is heavily oriented to restaurants, art galleries and specialty shops which are typical of entertainment/retail destinations.

With this mix of stores, Olde Englewood Village would need to attract close to an average of 60,000 tourists per week³ and 18,000 tourists per weekend, totaling almost three million tourists each year. Otherwise, Olde Englewood Village would need to attract 304,000 resident customers annually or 3,600 each weekend. The weekly count would increase during season and decrease off-season, if the region's seasonality trend continues.

The physical area of Olde Englewood Village could accommodate as much as 400,000 square feet of ground-level, destination retail space.⁴ The demand for that level of retail absorption would require 8.6 million tourists annually, assuming existing spending patterns, or nearly 870,000 regional visitors.

Olde Englewood Village, like most cities and towns throughout Florida, is experiencing increased competition within the "entertainment/retail" or destination market segment.

Nearly every downtown in Florida today has ongoing redevelopment efforts using CRAs and Main Street Programs to redevelop and market their "product." A number of these competing destinations

³ This is average, meaning that it would be higher in-season and less during shoulder and non-seasonal times.

⁴ Destination retail includes restaurants.

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have developed unique niches tailored toward their defined markets. The State of Florida has now developed an entire marketing program specifically oriented toward “Downtowns & Small Towns.”⁵

Within the greater 100-mile region of Englewood, there are over 40 competing venues attempting to tap the destination market. For example, Venice, Sarasota, Bradenton, Punta Gorda, Ft. Myers, Ybor City, Clearwater, Safety Harbor, Tarpon Springs, Dunedin, and St. Petersburg are all developing “sense of place” redevelopment plans to attract customers. While most use a combination of themes, several are oriented toward culture and the arts.⁶ These include:

- Bradenton (Village of the Arts),
- Sarasota (Towles Court),
- Downtown St. Petersburg,
- Tarpon Springs, and
- Lakeland.

Sarasota County is reported to be spending 17% of its tourism development tax to support art institutions. Other areas such as Dunedin, Safety Harbor, Ft. Myers, and Lynn Haven have focused on “historic downtown,” while some use “antiques,” such as Mount Dora and Tarpon Springs Downtown.

WHY OLDE ENGLEWOOD VILLAGE?

The most fundamental question for creating an end destination for Olde Englewood Village is “what makes Olde Englewood unique?” Retail alone does not create a sense of place.⁷ Olde Englewood Village is not an empty palate where a large developer controls 40-100 acres and can create an “Old Downtown” from scratch.⁸ Because the area’s vacant parcels and existing buildings are individually owned, investment in the redevelopment of Olde Englewood Village will require a creditable vision of “Why Englewood?” Part of that vision is the belief that there will be new anchors/attractors generating enough customer traffic to support both existing and future retail space.

A community workshop lead by SPG was held on January 12, 2006. During the workshop, the community felt its prime assets included:

1. Lemon Bay
2. Artists and Artists Overlay District
3. Playhouse
4. Existing merchants
5. Possible Gauguin Museum
6. Maritime Museum
7. Possible connection to Beaches

⁵ Florida’s *Downtowns & Small Towns Program* and a second program started in 2001, *Culturally Florida*. A good source of information is *Tourism and Florida’s Emerging Downtowns & Small Towns, a Guide to New Tourism Partnerships and Enhancing New Product Development & Marketing*, October 2005.

⁶ Florida’s Tourism Marketing Agency (Visit Florida) reports that 25% of Florida visitors enjoy Florida’s “arts and culture” and spent \$2.9 million in 1997, when the State had only 47 million visitors (that visitation has now risen to 80 million).

⁷ There are areas in Florida and the United States where “off-price malls,” (i.e., Sawgrass Mills in Broward County), are so large and unique that they have become a destination, but this is rare.

⁸ Examples include the Villages in Lake and Marion Counties and Celebration near Disney World.

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8. CRA/TIF

Using these assets as a start, the community has numerous alternatives to explore in its attempt to draw a significant customer base to the Village.

LEMON BAY

Based on the history of Englewood, the town was formed as a result of its connection to Lemon Bay. The recent history of the area goes back to 1878, when the Goff family purchased 60 acres of land bordering Lemon Bay. In 1896, Englewood was platted and in 1916, the Buchan family built a 250-foot dock out into Lemon Bay to allow boats carrying merchandise to unload. In 1924, the Royal Casino was opened at the end of the Buchan dock.

Today, the commercial areas along Dearborn Street are cut off from the Bay and it is no longer an "attractor." Yet, the community vision is to create a nautical theme.⁹ The Olde Englewood Village Association refers to the Village as Olde Englewood Village or Lemon Bay. The County (Englewood CRA) has recently purchased land along the Bay at Cherokee Street and the west end of Dearborn, providing potential access to Lemon Bay. The question remains as to its use.

Several alternatives have been discussed ranging from creating a park to using the existing residential structure as a museum. One alternative would be to develop a 250-foot pier out into the Bay. A second alternative would be to create a public/private partnership to develop the pier at or near its original location.

A pier by itself would not act as a sufficient attractor. Lemon Bay affords the community and visitors numerous venues. First, the immediate area has two excellent parks: Indian Mound Park (five blocks south of Dearborn Street) and Lemon Bay Park (ten blocks northwest of Dearborn Street). Lemon Bay Park is oriented toward ecotourism while Indian Mound Park has an excellent boat launch.

Within the CRA and across Lemon Bay on Manasota Key are public beaches. Just across the Bay from the Village is Middle Beach (Blind Pass Beach). As reported earlier, beaches are Florida's greatest draw. However, access to Blind Pass Beach is neither direct nor convenient. If a means were available to offer beach access from the Village via ferry (either electric or motor), such service could be considered a positive venue to attract visitors to the area. Recent studies in Jacksonville, Florida, suggest that an aerial transit system (cable cars on 150 ft cables) that can move 2,400 people per hour in each direction is viable for crossing the St. Johns River at a cost of \$8 million per mile. Furthermore, if there were a way to interconnect downtown, Lemon Bay, Indian Mound Parks and Blind Pass Beach, it might be possible to further strengthen the attractiveness of Olde Englewood Village.

In order to capitalize on its history, a public/private partnership to develop a restaurant at the end of the pier resembling the Royal Casino would serve as another anchor. Restaurants, in sufficient quantity, (4-6 full-service and specialty) can anchor destination centers.

⁹ HyettPalma Economic Summit, March 15, 2004

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ARTS AND CULTURE

Sarasota and Sarasota County have long been known as a center for artists and culture. In fact, it advertises itself as “the Cultural Coast.” The Englewood area, for a host of reasons, is now home to a large population of artists. According to information supplied by the Arts Alliance of Lemon Bay,¹⁰ in the immediate area there are 44 artists. The Village also contains the Englewood Arts Center and some galleries. The community is in the process of seeking an Arts Overlay District within the downtown adjacent to Dearborn Street where artists would live and work. The Village has a small, but successful Playhouse (Lemon Bay Playhouse) with plans to increase its seating to 400.

GAUGUIN MUSEUM

The Arts Alliance of Lemon Bay is working hard to establish a Gauguin Museum within the Village. One of Gauguin’s sons, Emile, lived and is buried in Englewood. The Arts Alliance has significant Gauguin prints and other artifacts from Emile’s estate.

HISTORIC RESOURCES

Olde Englewood Village has a number of historic structures, including:

- Lemon Bay Woman’s Club
- The Lampp Residence
- Quimby-Jergens-Rinkard House
- Dearborn Street
- Buchan’s Landing,
- Ziegler Hardware Store, and
- The Green Street Church Museum.

OLDE ENGLEWOOD VILLAGE VISION

A Vision Workshop was held on February 23, 2006, to solicit public input as to what the local community envisioned Olde Englewood Village to be in 2010 and beyond. The vision is that Olde Englewood Village would become an end destination, historic, seaport village.

Furthermore, it was felt that the new vision statement should:

- Include “attract sufficient customer/tourists to support 150,000 – 250,000 sq ft of retail space.”
- Make it clear that Lemon Bay needs to become the prime theme or anchor with the theme being one of an historic seaport that should make the area unique.
- State that there should be more than one activity associated with the Bay, such as
 - A pier or piers (viewed as the most important),
 - A casino or other activity, such as a restaurant or raw bar at end of pier.
 - A ferry or cable car to interconnect Blind Pass, Lemon Bay Park and Indian Mound Park.

¹⁰ The Arts Alliance of Lemon Bay, Inc., provided a detailed list of local arts (by medium) and is active in spearheading efforts to develop a Gauguin Museum in the Village.

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- Dock space to allow transient boat tie-up so that passengers can shop downtown.
- Water features, such as fountains and lights
- Promote ecotourism with the use of windmills, electric ferry boats or cable cars.
- Promote the “Arts Village” concept.
- Promote a Gauguin museum.
- Consider a maritime museum or have an old boat at one of the piers.
- Promote the performing arts expansion/relocation.
- Proceed with a phased development – promote 150,000 sq. ft. retail within area approximating 1,500 linear feet of Bay. Concept is to develop at least 250,000 sq. ft. retail within slightly expanded area to ensure critical mass.
- Create a true “sense of place.”
- Understand that no one feature or asset is sufficient; for they must work together to achieve a marketing critical mass.

By bundling these assets/resources, Olde Englewood Village could become an entertainment/retail destination serving Sarasota and Charlotte Counties and attracting visitors from other areas of Florida and beyond.

This vision is based on several premises.

First, while Olde Englewood Village has numerous assets, no one is sufficiently strong enough to attract the customers/visitors needed to generate the economic activity required to absorb the necessary retail/restaurant square footage.

Second, it is critical to establish an activity center anchored by Lemon Bay which is the Village’s greatest asset.

Third, a storm water system should be established allowing development to tie into the system without on-site requirements.

Fourth, sufficient public parking should be provided at strategic locations reducing or eliminating on-site parking.

Fifth, a unified marketing approach should be created to promote the Village which would include numerous, if not bimonthly, events focusing on the area’s assets. This could include festivals focusing on Lemon Bay and the area’s environmental resources (ecotourism), festivals to promote the local artists, as well as festivals to promote the new Gauguin Museum, the performing arts, wine and food, etc.

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ACTION PLAN

The Action Plan defines the critical activities that need to be undertaken in order to develop an entertainment/retail destination for Olde Englewood Village. It is broken down into major categories: Planning, Infrastructure, Incentives, Management and Marketing.

PLANNING

Olde Englewood Village is part of the larger Englewood CRA. Success of the redevelopment program described within this report requires the redevelopment planning of other areas of the CRA, specifically gateway developments, façade and place-making improvements along State Road 776, connection to Lemon Bay and Indian Mound Parks and redevelopment of land parcels surrounding the Main Street Overlay District (MSOD). The CRA should also consider renaming Indiana Avenue (State Road 776) “Englewood Avenue.”

Other place-making improvements should include the planning of public space improvements on CRA-owned properties abutting Lemon Bay and the continued buying of land parcels fronting Lemon Bay. One of the most important steps for successful implementation of the Plan is an updated CRA Revitalization Plan that takes into account the recommendation of this study.

Existing land development regulations need to be updated to allow the Olde Englewood Village area to be developed as a “Downtown.” This includes wider sidewalks, limited front set backs, limited parking requirements, no storm water requirements, and strong architectural guidelines. The County may wish to adopt a downtown retail ordinance specifying the minimum retail coverage at ground level (usually 75% or greater). Wayfaring signage needs to be developed throughout the CRA, not just the MSOD. The County/CRA should consider placing kiosks throughout Downtown depicting major activities or establishments, and creating form-based regulations for the MSOD. The development of tree coverage or awnings over the sidewalks is important, as heat is an issue for most of the year and impacts pedestrian traffic.

Lastly, the County should explore defining the Downtown as an historic area and working with FDOT for the placement of “brown” historic signage along the Interstate, US 41 and State Road 776.

INFRASTRUCTURE

Redevelopment efforts require major public-sector investments, several of which will be required.

- A public, storm water system needs to be developed eliminating the need for parcel-based retention.
- The existing retention pond on Dearborn Street needs to be eliminated. It lies within the most critical 1,500-foot radius of the waterfront.
- One or more piers and activity centers need to be developed on Lemon Bay, including boat docks.
- Public parking will need to be expanded beyond that of the newly designed public parking lot located between Cedar and Elm Streets. A future parking study will be required to determine the proper location of a structured parking garage once the pier(s) and 100,000 square feet of additional retail space are completed.

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- Public sector financing will probably be required to support the proposed ferry or cable car operations (at least during the first five years of operation).
- Public support will more than likely be required to develop the Gauguin and Maritime Museums.

INCENTIVES

In most redevelopment efforts, the public sector provides incentives to the private sector to facilitate or speed-up development. Several of these “incentives” have already been discussed:

1. Removal of storm water requirements.
2. Removal or lessening of on-site parking requirements.
3. Creation of new gateways and waterfront activity centers.
4. Promotion of connectivity between Lemon Bay and Dearborn Street.
5. Updating land use regulations.
6. Provision of public parking.
7. Planning for tree canopy to reduce sidewalk heat.
8. Promotion of additional lodging, including bed and breakfast establishments.
9. Promotion of downtown mixed use projects with housing.

Other incentives that need to be considered include:

1. Improvement of appearance/building façade through Façade and Rehabilitation grants.
2. Increased police presence for perceived safety.
3. Increased beautification through street cleaning/maintenance and garbage bins.
4. Expedited permitting.

MANAGEMENT AND MARKETING

Management and marketing are the keys to successful retail redevelopment efforts. It is strongly recommended that the Main Street Program be developed for Olde Englewood Village (see the Appendix for information on the Main Street Program). As the Downtown redevelops, the merchants should consider the creation of a Business Improvement District that can take over numerous public-sector functions, including increased public safety, beautification, clean-up and special events.

Marketing is critical to the success of Olde Englewood Village. The most immediate concern is creating a positive image or marketing campaign for the MSOD. The image is that of an “historic seaport village, but unfortunately, the existing Downtown façade and amenities do not convey that impression. An intermediate approach will be needed prior to the development of the “critical mass.”

As development occurs, festival management/marketing will be critical. Given the area’s bundle of assets, the CRA should consider monthly festival themes which need to be expanded as critical mass becomes a reality. There should be at least three arts festivals a year. These need to consider the newly designed “arts district.” Public waterfront properties could be used for exhibits. The Gauguin Museum is a critical component of the arts marketing program and efforts should begin immediately to locate a temporary location for the exhibits, as this could be one of three themes. Performing arts could be a second theme with two or more festivals a month (i.e., “evening of arts” theme). The local restaurants could continue the Saturday night Dearborn event with music and food. A cultural/historic theme could

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be used to display the area's historic structures, while several "ecotourism" festivals could highlight Lemon Bay, Indian Mound and Lemon Bay Park.

It is important to note that first impressions are critical. Therefore, as the marketing campaign is developed, it needs to address what access is currently available (at the time of festivals), and there may be the need to start slowing until activity centers have been developed and wayfaring signs put into place.

TIMING

Action Items	Phasing					
	3rd Quarter 06	4th Quarter 06	1st Quarter 07	2nd Quarter 07	3rd Quarter 07	4th Quarter 07
Planning Actions						
Update CRA Master Plan	issue RFP					
Wayfaring Plan	issue RFP					
Signage	issue RFP					
Retail Ordinance		Study				
Remove/lessen on-site parking requirements						
Promote Connectivity Lemon Bay						
Brown Historic Sign Placement						
Establish Incentives						
Infrastructure Actions						
Complete Stormwater System	Short term improvements		Issue RFP for Long term solution			
Develop Piers/Docks				issue RFP		
Establish Ferry or Cable Car System				issue RFP		
Establish Gauquin Museum	Siting Study short and long term		issue RFP			
Establish Maritime Museum				issue RFP		
Support Performing Arts Center	Siting Study					
Gateway Development					Issue Bid	
Establish other Activity Centers				Issue RFP		
Marketing/Management						
Join Main Street Program						
Establish BID						
Develop Marketing Program				issue RFP		
Footnote:						
Issue RFP						
Study						
Implementation						