

DRAFT MEMORANDUM

TO: Bill Rice, City of Jamestown

FROM: Sarah Woodworth

RE: Target Business Mix for Downtown Jamestown

DATE: January 24, 2011

THE PURPOSE OF THIS ANALYSIS

W-ZHA was retained to identify a target business mix for Downtown Jamestown given Downtown's brand of "Up Close and Wonderful". The branding study identified Downtown's target market as those households that are interested in an urban vibe as well as an accessible creative center. W-ZHA was asked to employ our national experience in Downtown revitalization and our knowledge of the Jamestown market to:

- Identify specific Downtown market niches that support the brand;
- Identify target stores/businesses and Downtown locations to guide Downtown investment and marketing;
- Identify target sites and/or buildings for near term investment

The Business Recruitment Plan is intended to enhance the economic development potential of not only Downtown Jamestown, but the Region.

THE GOAL

The goal of the Business Recruitment Plan is consistent with the State's "Strategy for Prosperity in Western New York". The Business Recruitment Plan is an implementation tool intended to a) create and retain jobs in the City and the region, and b) maximize Downtown investors' return on investment. The recruitment strategy is designed to satisfy the State's Strategic Goals of:

- A Plan that is **inclusive** by addressing the needs of a broad range of markets;
- A Plan that is emblematic of **Smart Growth** because it encourages Downtown redevelopment and the adaptive reuse of older buildings;
- A Plan that **supports New York's target industries** namely tourism and professional services companies;
- A Plan that is targeted to **young adults and entrepreneurs**;
- A Plan that **builds upon existing assets and strengths**; and



- A Plan that is designed *to improve Western New York's image*.

Downtown Jamestown is an important commercial hub in the Western New York Region. Therefore, the revitalization of Downtown Jamestown as a business, cultural, and recreation destination will not only benefit the City, but the region as a whole.

DOWNTOWN REVITALIZATION PRINCIPLES¹

The recommendations contained in the Technical Memorandum are intended to satisfy the basic principles for a successful Downtown. Together these principles represent a complex integration of design and development ideas that can support Downtown as a place where people want to live, work and play. The principles are as follows:

Strong Downtowns support a vibrant economy: As the urban center to a region, strong Downtowns are the economic center of the regional economy. Major corporations, banks, legal firms, restaurants, retailers, and seats of government locate in Downtowns. The mix of land uses creates synergy among and between land uses which, in turn, creates vibrancy.

Strong Downtowns evoke a sense of place: Whether it be buildings, public spaces, or natural resources, in strong Downtowns unique assets are combined to create a memorable sense of place.

Strong Downtowns have a rich public realm: The streets, sidewalks and parks and building facades constitute the public realm and in strong Downtowns the public realm has physical and psychological appeal. Strong Downtowns imbue a sense of comfort to both the resident and the visitor.

Strong Downtowns are sustainable: Strong Downtowns adapt to change by reusing resources and building on assets. Adaptive reuse of buildings from one use to another is efficient and contributes to a unique sense of place.

Strong Downtowns have a harmonious mix of uses: Downtowns used to be perceived as places to work. However, today Downtowns are places where people live, recreate and shop. Strong Downtowns offer these options in an integrated environment where each land use supports the other. The objective is to create a safe and vital environment 18 to 24 hours a day, seven days a week.

Strong Downtowns have people: People are what give Downtowns their character and personality as well as its energy. Strong Downtowns are walkable, safe, and attractive.

Strong Downtowns respect and celebrate their natural ecology: Strong Downtowns integrate natural systems into the urban experience and promote sustainability practices.

¹ These Principles are from the Chattanooga, TN Downtown Plan.



Strong Downtowns are a product of cooperation and collaboration: Downtown revitalization is not easy and it does not happen quickly. Downtown revitalization requires patient partnerships based on a shared intent to build an authentic urban center. Developers, institutions, designers, planners, elected officials, zoning boards, contractors and administrators all have a hand in Downtown's evolution.

DOWNTOWN MARKET NICHES

Existing Conditions

An inventory of existing Downtown businesses was conducted by the Downtown Jamestown Development Corporation. Downtown Jamestown's business mix reflects its role as a business and service center. While important, the current business mix does not support its potential role as a cultural and recreational center for the region. With major anchors like the Reg Lenna Center and the Ice Arena, Downtown has the "hardware" to be a creative and recreational center. What it lacks is the "software" of supportive businesses that foster an arts and entrepreneurial culture.

Market Dynamics

Demographic, psycho-graphic and economic analyses have lead to the following conclusions:

- The tourist market is an opportunity for Downtown Jamestown;
- Local residents primarily those residing within a 30-minute drive time from Downtown Jamestown are a target market for Downtown Jamestown;
- Young Chautauqua County households with an interest in urban culture are a target market for Downtown Jamestown;
- Creative industries in Chautauqua County are a target market for Downtown Jamestown.

Downtown Market Niches

Three overlapping market niches are recommended to accomplish the brand: Downtown As An Adventure Center; Downtown As An Interactive Cultural Center; and, Downtown As A Creative Industry Hub.

Adventure Center: The concept here is for the region's top outfitters and tour companies to locate Downtown. These stores target both the tourist market and the local market. These stores offer the types of products that are appealing to rural residents and active youth. Suburban Blend is a good example of an existing Downtown store that occupies this niche. Other examples include:

- An Adventure Center: One concept is an Adventure Center where outfitters and tour companies get together and form a single Adventure Center. Visitors come to the Adventure Center (either in-person or via the web) to plan their trip, rent equipment (bikes, kayaks, skis/boards, paddle boards, etc.), and sign up for tours. By creating a one-stop shop environment, collaborating tour



companies reap the benefit of economies of scale. An example of this is the privately owned and operated *Adventure Center* in Moab, UT.

- Hunting and Fishing Stores, and
- Seasonal Sports Stores where they sell and rent snow boards and skis in the winter and water skis and wind surfers in the summer
- Extreme Sports Stores
- Wild Bird Centers

Downtown programming can support this economic position. Demonstrations, classes, and outdoor-sports-related consumer shows need to be developed to bring the local and regional market into the Downtown.

Interactive Cultural Center: As an interactive cultural center Downtown Jamestown could be attractive to “those that are interested in an urban vibe and an accessible creative center”. In fact, in many places, the arts have lead Downtown revitalization efforts. Many successful Downtowns in markets of comparable size, offer a broad range of arts-related store-types. Most of the stores are specialty stores and, as such, draw from a large trade area. They are also attractive to the tourist because they are unique and memorable. Store-types and establishments that often succeed in a Downtown environment include:

- Craft brew pub (with entertainment);
- Home accessory stores/antiques/furniture;
- “Hip” apparel and accessories;
- Art galleries;
- Wine store;
- Yarn/fabric/craft stores

Creative Industry Hub: Jamestown should position itself as the County’s creative industry hub. We recognize that Jamestown cannot successfully compete with Buffalo for many creative companies. Jamestown can be, however, an attractive location for local companies and new entrepreneurs interested in locating their businesses in an affordable, walkable, urban environment. As “buzz” develops about Downtown Jamestown, it will become an attractive business location, particularly among the creative industries. Target industries include:

- Publishing;
- Software design and distribution;
- Broadcasting and studios;
- Data processing/back office space;
- Craft industries (art, furniture, giftware);
- Architects, interior design, and landscape architects



Downtown can be an incubator for these types of industries. More and more, entrepreneurs are “laptop” businesses who value the services and diversity Downtowns can offer. These entrepreneurs are prospective tenants as well as potential Downtown residents.

THE BUSINESS RECRUITMENT PLAN

The Plan is to target tenant recruitment efforts to specific Districts in the Downtown. Clustering mutually supportive businesses enhances the potential for market synergy. It is important to note, that the Districts are intended to inform business location decisions, not dictate business locations. There are a number of factors that contribute to business location including building/space availability, price and business preference. The Plan’s intent is to direct businesses into those areas of the Downtown that they will likely thrive.

The three Downtown Districts are as follows:

- The Explore District;
- The Service District; and,
- The Destination District

The following paragraphs summarize each District’s boundaries, assets, target tenants, near term target projects and mid-term target projects. The near term is defined as within the next five years. The mid-term is within the five to ten year timeframe.

THE EXPLORE DISTRICT

Boundaries: Both sides of Main Street to Spring Street from 1st to 5th Street

Vision: The Explore District will be a place where many Downtown workers have lunch, where creative industries locate businesses, where the arts and eating and drinking establishments proliferate for day and evening activity, where young households and empty nesters reside. Capitalizing on nearby employment centers and existing restaurants and attractions, the Explore District will be a vibrant environment during the day, evening and night. The Explore District contains attractive walkable streets and some of the best buildings for adaptive re-use in the Downtown. The Explore District will be oriented to strolling where the pedestrian can explore and discover unique shops, restaurants and attractions Downtown. This is the part of Downtown that offers the finer-grain urban environment – pocket parks, small stores, on-street parking, etc.

Existing Conditions: The Explore District contains the Downtown’s major cultural attractions (the Lucy & Desi Museum and gift shop; the Jackson Center; the Reg Lenna Theater; the Little Theater; the Crown Theater, and Wintergarten Plaza), cafes and full-service restaurants, retail and services and housing that is mostly occupied by younger households and artists. Main Street is an important “hinge” between the



“Service District” to the west and the “Explore District” to the west. As a central Downtown spine, Main Street can be both a place for convenience retail and specialty retail uses.

The area around Pine and Third Street is particularly vibrant and one of the most active in the night time. There are a number of notable older buildings in the District that are currently in need of revitalization including, but not limited to, the Advertising Advantage building (southwest corner of Pine and 3rd), the Gron building (southeast corner of 2nd and Pine), the Arcade building (1st and Main), and the El Greco Mill (on 1st St).

Target Tenants:

Specialty Retail: Home accessory stores, antiques, furniture, “hip” apparel and accessories, wine store, bird center, art, books, music, jewelry, gift stores.

Unique Eating and Drinking Establishments: Non-chain, small restaurants and cafes preferably with live entertainment

Creative Industry Businesses: publishing, software, broadcasting, craft industries, architects, interior design, and landscape design

Near Term Target Projects

Continue to Strengthen Pine Street by Key Building Reuse

Adaptive Re-Use of Advertising Advantage building with upper-level urban lofts and a ground floor eating and drinking establishment (preferably with live entertainment).

Adaptive re-use of Gron Building with upper-level residential lofts and ground floor specialty retail (excellent location for wine store with parking across the street).

Upper-level residential adaptive reuse in the building on the northwest corner of 4th and Pine Streets.

Strengthen 2nd Street between Main and PineStreets by Red Building (name??) Renovation

Target specialty retail and eating and drinking establishments on 2nd Street, 3rd Street, and 4th Street.

Creative business recruitment for upper story space in the Explore District.

Program Wintergarten Plaza with events targeted primarily to the market within a 30-minute drive time to Downtown. Program examples include, but are not limited to, movies, children’s shows, arts and crafts shows, outdoor recreation education programs.



Develop package deals that encourage extending the stay in Downtown. For example, deals that offer a discount dinner at a Downtown restaurant if attending an event at a Downtown

Mid-Term Projects

Adaptive re-use of El Greco Mill to artist live/work housing using a mix of historic tax credits and low-income housing tax credits.

Long Term Projects

Adaptive re-use of Arcade building.

New mixed-use (office and residential) construction on 1st Street from Stillers Alley west to Institute Street.

THE SERVICE DISTRICT

Boundaries: From the back of the buildings abutting Washington Street to both sides of Main Street

Vision: The Service District will support Downtown's function as an attractive place to live and do business. Retail in the Service District will be oriented to the day-to-day needs of Downtown residents and Downtown businesses. As they are today, many of the storefront businesses will be oriented to convenience goods, and business and personal service. Target tenants are those that would locate in a neighborhood shopping center.

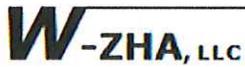
Existing Conditions: The Service District currently contains Downtown's highest concentration of residents. This part of Downtown currently functions as a service center for residents and businesses. Main Street is an important "hinge" between the Service District and the Explore District. Because of its traffic and visibility, Main Street functions as both a place for specialty retail as well as a logical location for convenience goods and service enterprises.

Target Tenants:

Convenience Retail: A pharmacy, a general merchandise store, a small food store, a small hardware store.

Personal and Professional Services: Beauty salons/barber shops/nail salons, phone service and accessories, reproduction services, custom framing, doctors' and dentists' offices, tax preparation, accountants, banking and lawyers' offices.

Neighborhood-Oriented Eating and Drinking Establishments: Take-out food, lunch restaurants, a neighborhood bar and grill.



Near Term Target Projects

Eating and drinking establishment in ground Floor of Wellman Building

Convenience goods and professional/personal services in the Service District

Mid-Term Projects

Small food store in the Service District

Neighborhood bar and grill in the Service District

THE DESTINATION DISTRICT

Boundaries: Both sides of Washington Street to Jefferson St. from the River to 5th Street

Vision: The Destination District will contain highly visible and memorable attractions, eating and drinking establishments/ retail and businesses. Icon land uses that symbolize Downtown's role as an Adventure Center, Interactive Cultural Center and Creative Industry Hub will occupy the Destination District. The Destination District will be the gateway to Downtown Jamestown as well as the nearby region. The Destination District will be a place that visitors and residents alike will patronize.

Existing Conditions: The major land uses in the Destination District are the old train station, the Ice Arena, Shawbucks, BWB office building, the Best Western hotel, the Renaissance Center, and the Furniture Mart Building. These uses are highly visible from 3rd and Washington Streets because they are stand-alone buildings with surface parking nearby. The Jamestown Savings Ice Arena is a major Downtown attraction that hosts skating events as well as consumer shows. The railroad station is being renovated and is slated to contain Jamestown's Visitor Center. The area around the Ice Arena is often used for Downtown Festivals.

Target Tenants

Larger Scale, Destination Retail: Store-types like an Adventure Center (equipment rental, tour operations, outdoor gear), an outdoor outfitter, gallery, craft furniture or home accessories store, craft food store like artisan cheese and meat, and organic vegetables.

Larger Scale, Destination Eating and Drinking Establishment(s): A craft brew pub, a themed restaurant, a quality chain restaurant.

Medium to Large Creative Industry Office: Offices for businesses that exemplify the professional services and creative industry hub market niche.

Near Term Target Projects

Occupancy of the train station with a destination eating and drinking establishment (like a craft brew pub) and a large scale recreation-oriented retailer. The brew pub would support the Ice Arena and nearby office and residential land uses. It has the potential to be a highly visible and unique tourist destination. A large scale retailer, particularly an adventure center or outdoor outfitter, would serve both the local and tourist market. If it were to occupy the eastern end of the train station, it could open the train station's "garage doors" and exhibit kayaks, paddle boards, boats and other merchandise outside.

Occupancy of the Renaissance Center with a use that symbolizes any one of the Downtown market niches: Adventure Center (for example, an outdoor outfitter); Interactive Cultural Center (for example, an art gallery or restaurant); a Creative Industry Hub (for example, an architecture or high tech firm). The Renaissance Center is a prominent building in the Downtown. It is important for this building's exterior façade and land use to imbue a positive image.

Programming: The Destination District should be the "home address" for large scale events in Downtown Jamestown.

Long Term Projects

Build-to-Suit Office: The Destination District has a number of under-utilized lots (such as the parking lot on the northwest corner of Washington Street and Federal Alley and the empty gas station on the northwest corner of Jefferson and 3rd Streets) that would be excellent build-to-suit professional office locations.

BENCHMARKING

A target timeframe for short-term project implementation is five years.

In addition, to these short-term target projects the following benchmarks are recommended for the next five years:

- Four new creative cluster businesses in the Downtown;
- Two new arts-oriented retail businesses in the Downtown;
- Two new eating/drinking establishments;
- One additional live entertainment venue Downtown