



Elizabethtown Area Chamber of Commerce

## **DOWNTOWN ELIZABETHTOWN MARKET PROFILE**

2016

# DOWNTOWN ELIZABETHTOWN MARKET PROFILE

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## EXECUTIVE SUMMARY

Following their development of “Guiding Priorities for a Refocus on the Downtown and Community” in 2015, the Borough of Elizabethtown entered into a Memorandum of Understanding with the Elizabethtown Area Chamber of Commerce with the intent of having the Chamber focus on the implementation of an emerging economic development initiative for downtown Elizabethtown. This Downtown Elizabethtown Market Profile is the product of the work done to date by the Chamber through its Downtown Business Committee. The profile includes demographic and psychographic information to better understand the primary and larger market served by the downtown, consumer spending and retail demand data, downtown property and business information, and the results of initial surveys of both downtown business owners and local consumers.

Primary among the Chamber’s responsibilities was to create a registry of commercial spaces within the downtown. Compiling information on downtown properties and businesses will aid in the development of a database that can generate statistics and comparative summary information for economic development initiatives. The outcome of a building-by-building survey of all properties and business spaces is a powerful tool that will be used to better understand existing and potential commercial categories, future sale/leasing opportunities, and gaps in the market. The development of a property and business database was completed through the efforts of the Downtown Business Committee with assistance from students at Elizabethtown College.

The property and business database will allow Borough and Chamber leaders to develop Key Performance Indicators to track the impact of the economic development initiative for downtown Elizabethtown. Tracking such data will ensure that progress is being made toward overall community and economic development goals. Key Performance Indicators for the downtown can include: property assessment values, property and business investment, business retention and recruitment, business revenue and job growth.

The Chamber also created several survey instruments to gather direct feedback about the downtown from both business owners and consumers. The Downtown Business Committee continues to work to get the surveys out to the community. This type of primary research is critical to understanding local perceptions about the downtown and its businesses. The ongoing results of the surveys will allow local leaders to develop and implement business assistance programs and/or policy to provide direct benefit to local business owners.

The Borough of Elizabethtown, in partnership with the Elizabethtown Area Chamber of Commerce (EACC), is taking a pro-active approach to planning for the future prosperity of downtown Elizabethtown. Having completed a strategic planning initiative in 2015, Borough leaders recognized the importance of gaining a solid understanding of the downtown in terms of infrastructure and building assets, existing businesses and their challenges, as well as demographics and other market based data. Armed with good information, Borough officials, in collaboration with EACC business leaders, will be able to move forward with planning and implementation of policies and programming to support the sustainable growth of the downtown.

The Downtown Elizabethtown Market Profile contains information in three major areas:

- **Market Information**
- **Property & Business Inventory**
- **Business Owner & Consumer Surveys**

The information and direction gained from compiling this market profile is an important step in laying the groundwork for current and future revitalization and business development strategies. Findings from the research can be used to establish benchmarks and to help provide direction for business and economic development initiatives in downtown Elizabethtown.

Before digging into the market profile, an understanding of the data resources and corresponding geographic areas covered by the data sets is critical. For this profile, we are using the following resources:

### **For the Market Information:**

The data resources included in the profile come from a series of Nielsen Claritas Data reports prepared by the Lancaster County Planning Commission (LCPC). A map of the areas covered by the LCPC data can be found in this section (on a subsequent page) for reference and further description of the geographic area is included at the beginning of the Market Information section of this report.

### **For the Psychographic Profile (within the Market Information section):**

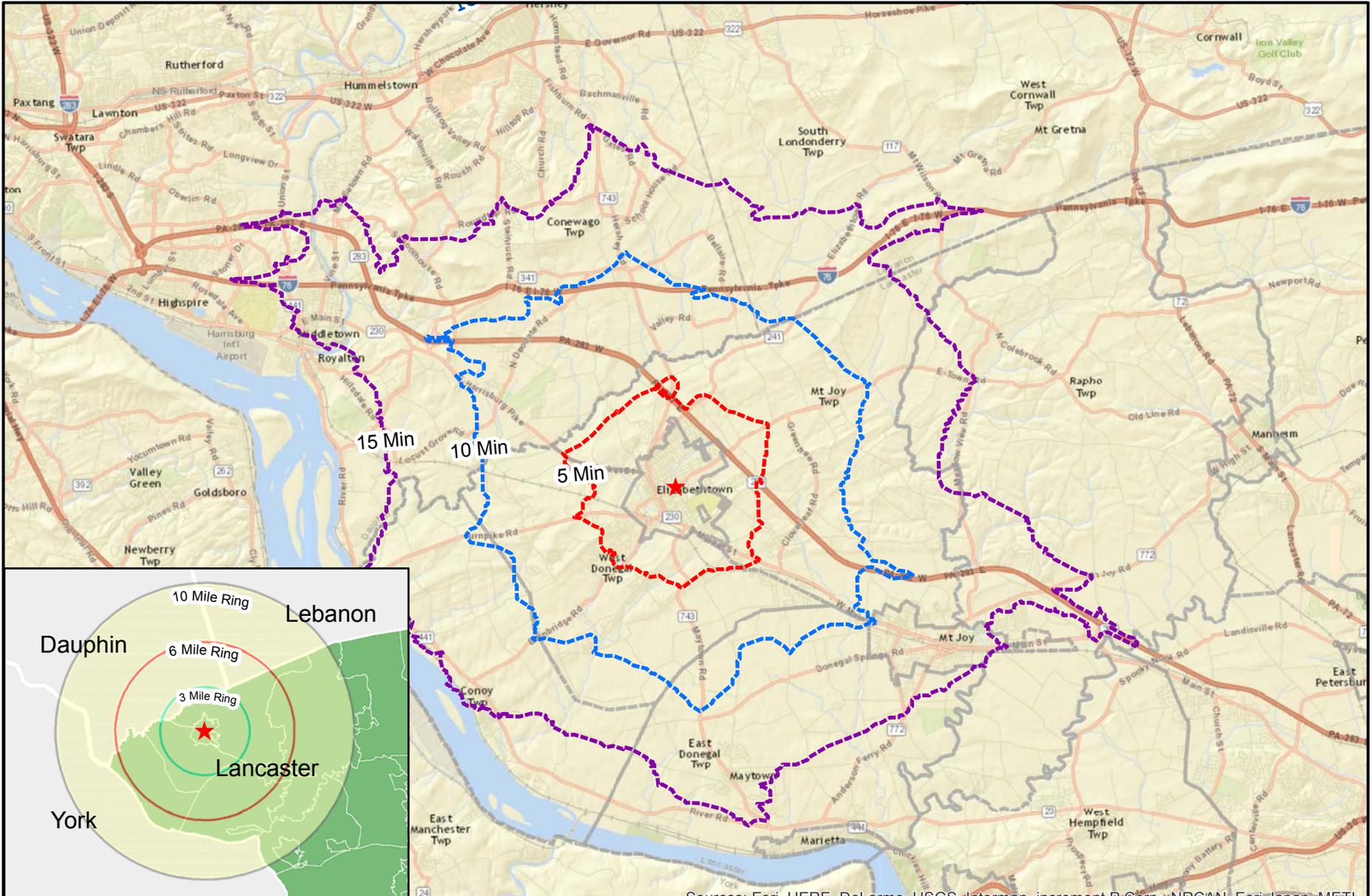
The data comes from Nielsen segmentation data. This web based resource allows us to look at the segmentation of the market within the 17022 zip code area as depicted in the graphic on the right.



### **For the Property and Business Inventory:**

The Property and Business Inventory focused on the areas of downtown Elizabethtown currently zoned as Central Business District and Mixed Use District. A map of the areas covered by these zoned areas can be found in this section (on a subsequent page) for reference.

# Retail Market Study Area Surrounding Elizabethtown Boro of Lancaster County



★ High/Mt Joy Street

1 in = 3 miles

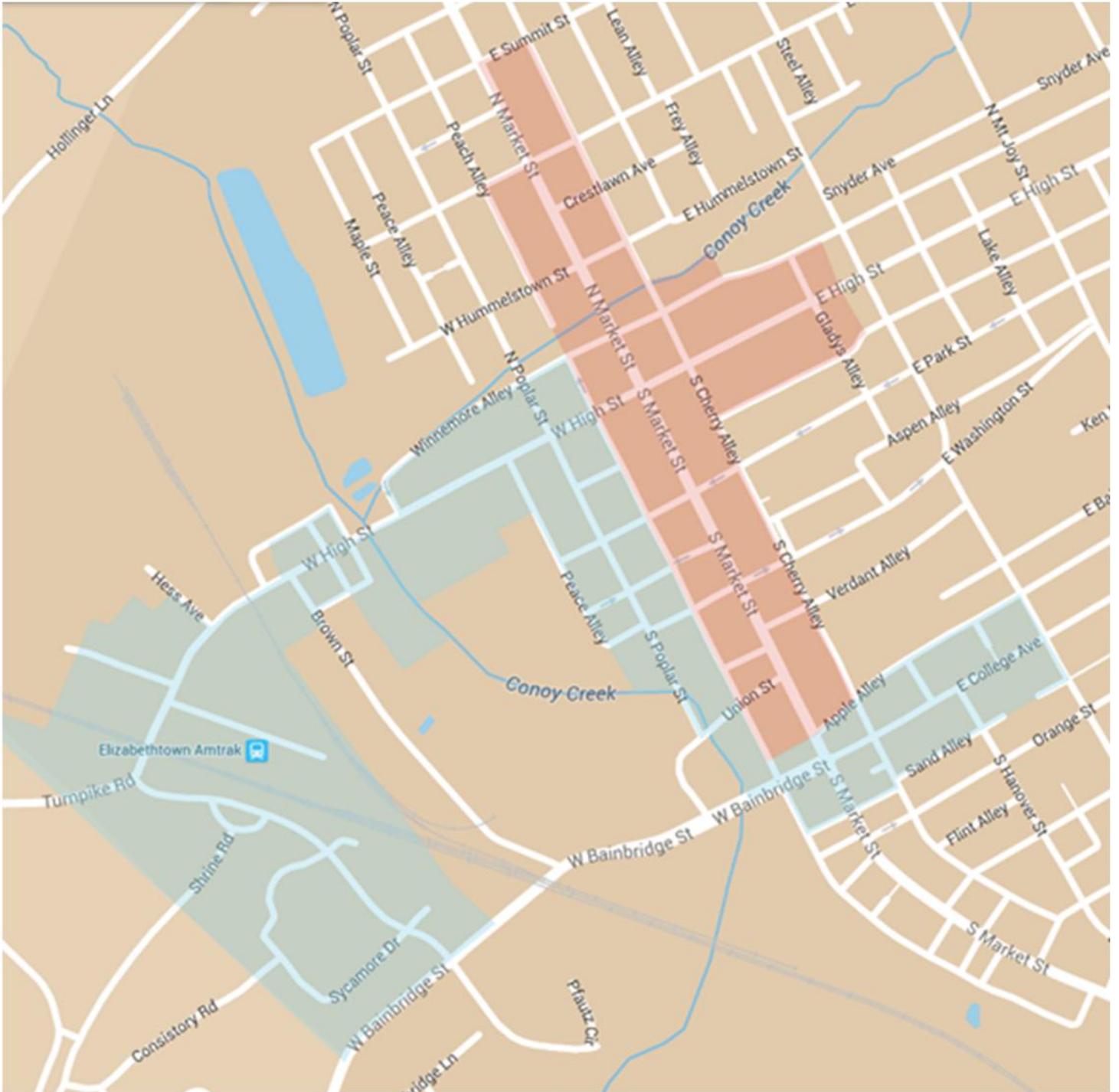
Source: Nielsen Claritas 2015

Generated by L Rose Long  
Lancaster County Planning Commission  
As of 11/12/2015

## Downtown Elizabethtown – Zoning Map

Central Business District = Red Shaded Area

Mixed Use District = Green Shaded Area



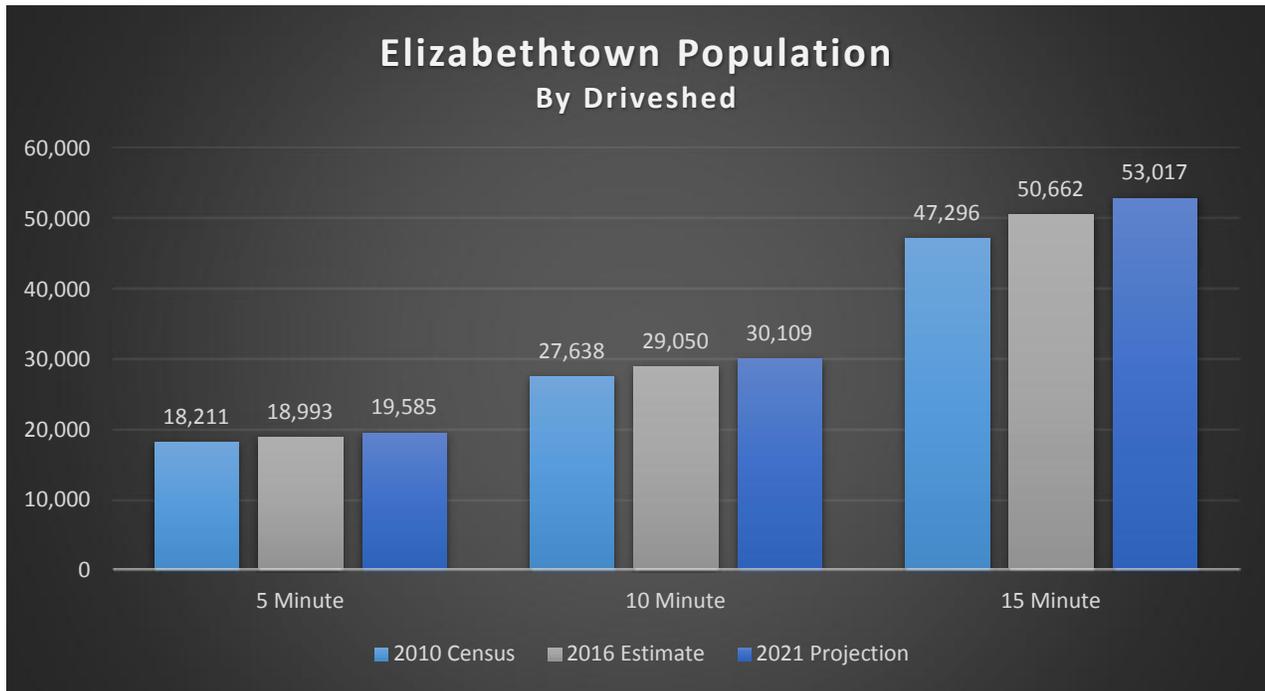
### **Definition and Map of Downtown Trade Area**

The profile assembled for the Downtown Elizabethtown market is based upon information contained in a series of Nielsen Claritas Data reports. The Lancaster County Planning Commission (LCPC) generated these reports for both areas covering a 3-, 6-, and 10-mile radius and for drivesheds of 5-, 10-, and 15-minutes. All of the data uses the center of the downtown business district (i.e., the corner of Market and High Streets) as the point of origination.

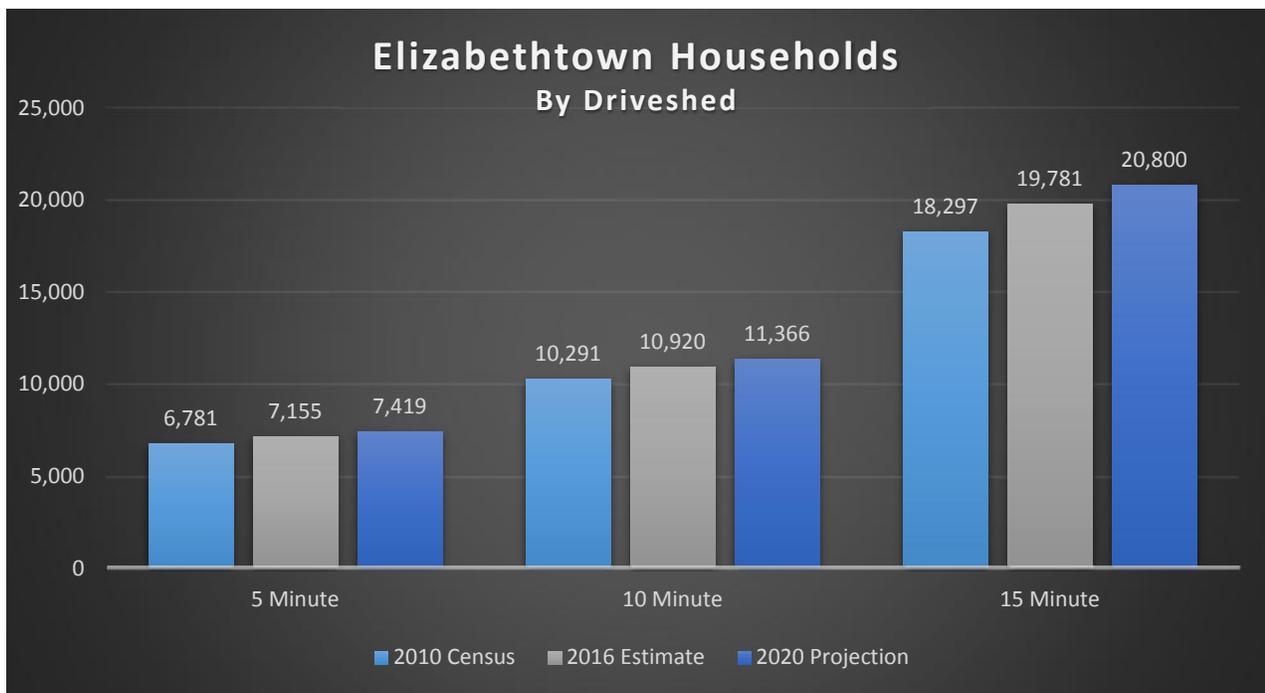
With access to previous LCPC reports generated for a handful of other communities in the region, the data presented in this profile will provide both a snapshot of demographics and trends in Elizabethtown as well as a comparison of Elizabethtown to these other (similar) communities. The main disadvantage to using information provided by LCPC is that (most of) it only contains data within Lancaster County, and does not offer comprehensive statistics beyond the county line into neighboring Dauphin, Lebanon, and York Counties. For Elizabethtown, the data within the 5-mile driveshed is complete and the 3-mile radius is nearly complete; however, as depicted in the map below, the larger radii and drivesheds are not. While this does limit the depth and breadth of the intelligence, the data available through LCPC is rich with good information for this profile and subsequent analysis.

## Demographic Snapshot

### Elizabethtown Driveshed | Quick Facts

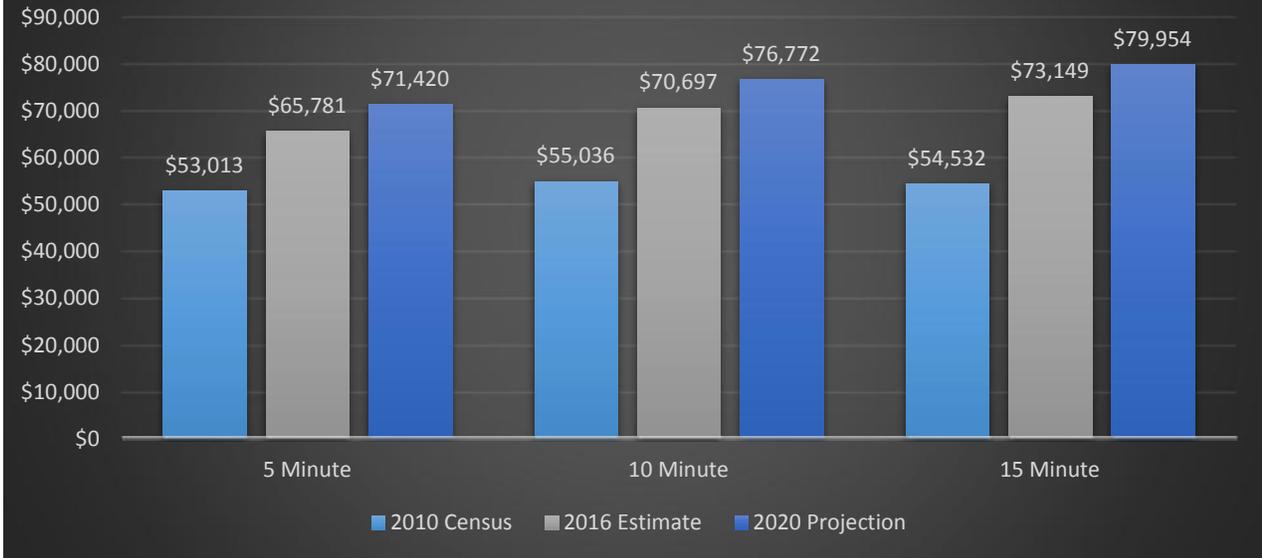


\*Only Lancaster County stats are shown in the above chart



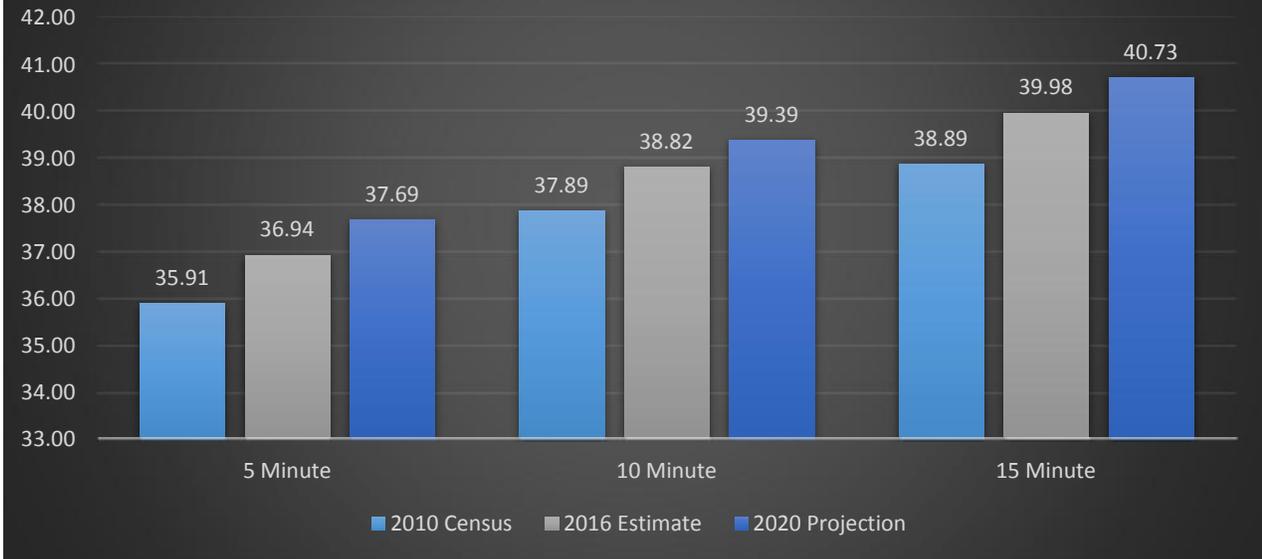
\*Only Lancaster County stats are shown in the above chart

## Elizabethtown Average Household Income By Driveshed



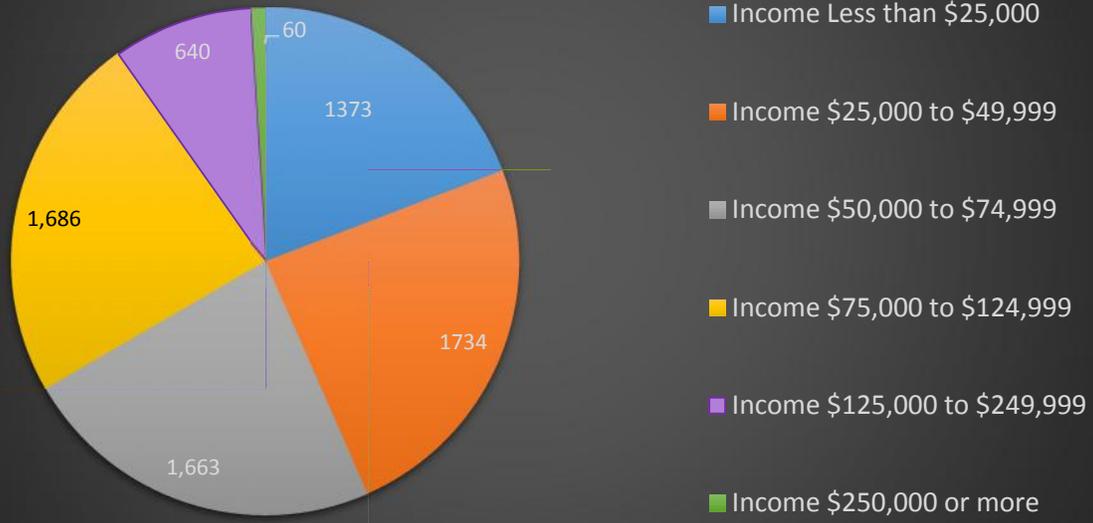
\*Only Lancaster County stats are shown in the above chart

## Elizabethtown Median Age By Driveshed

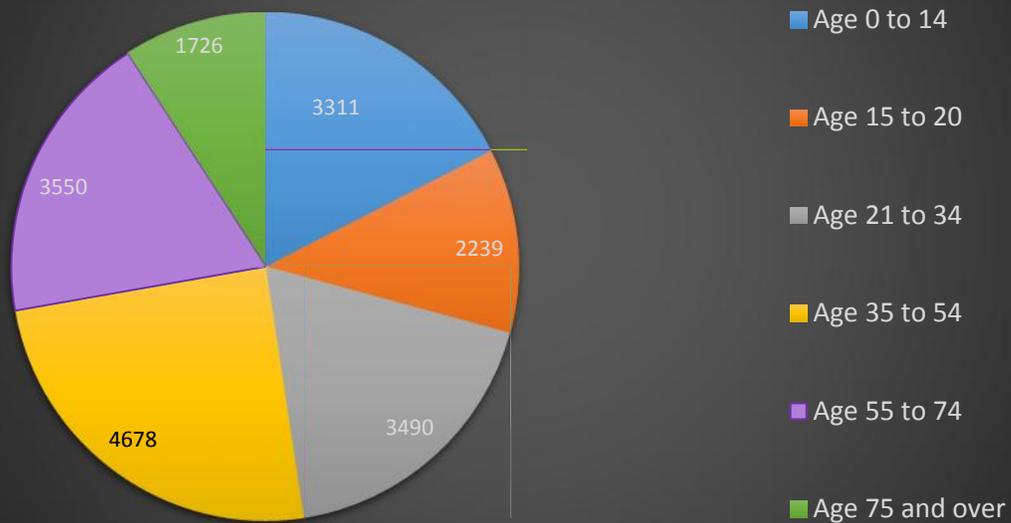


\*Only Lancaster County stats are shown in the above chart

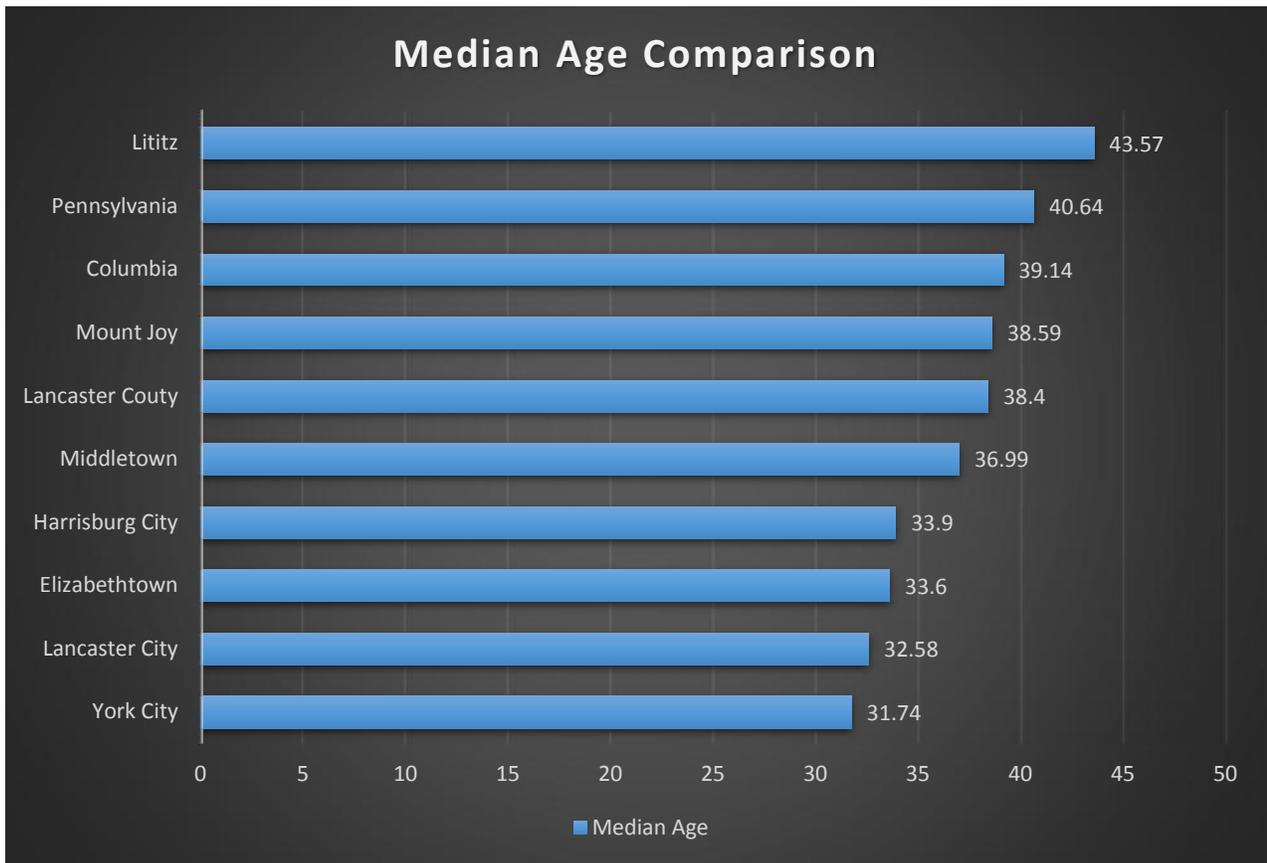
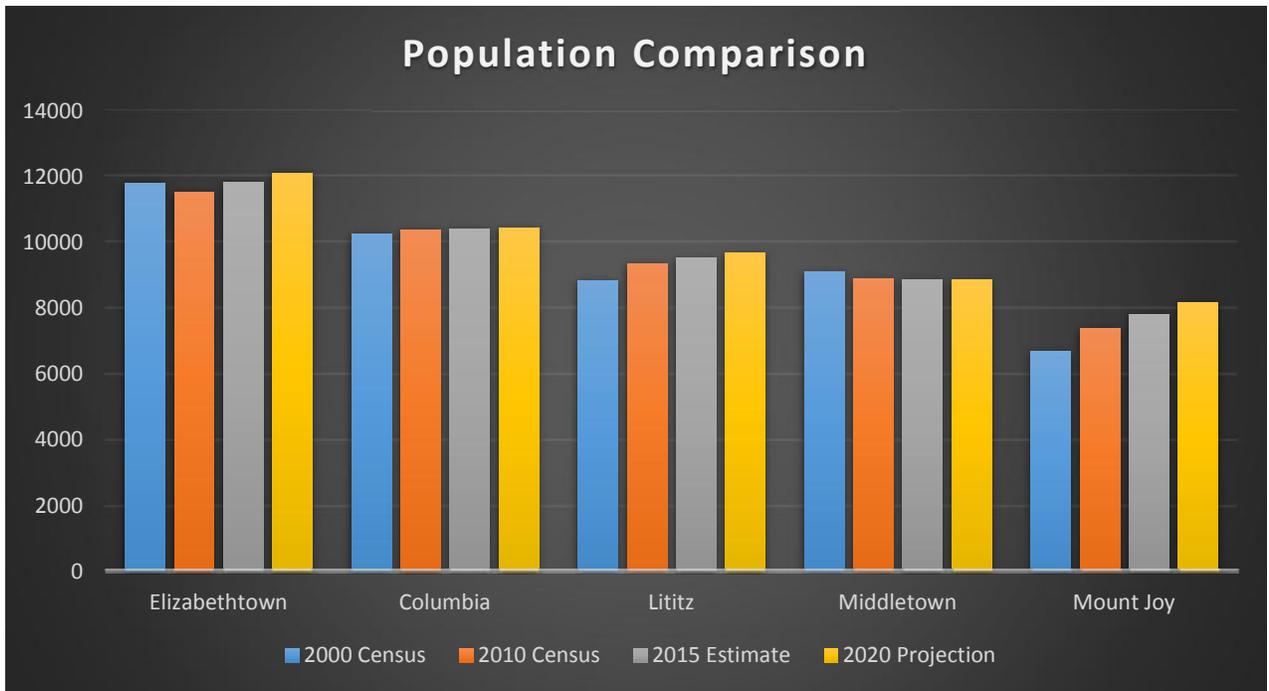
## Elizabethtown Households by Income 2016 Estimate in the 5-Minute Driveshed

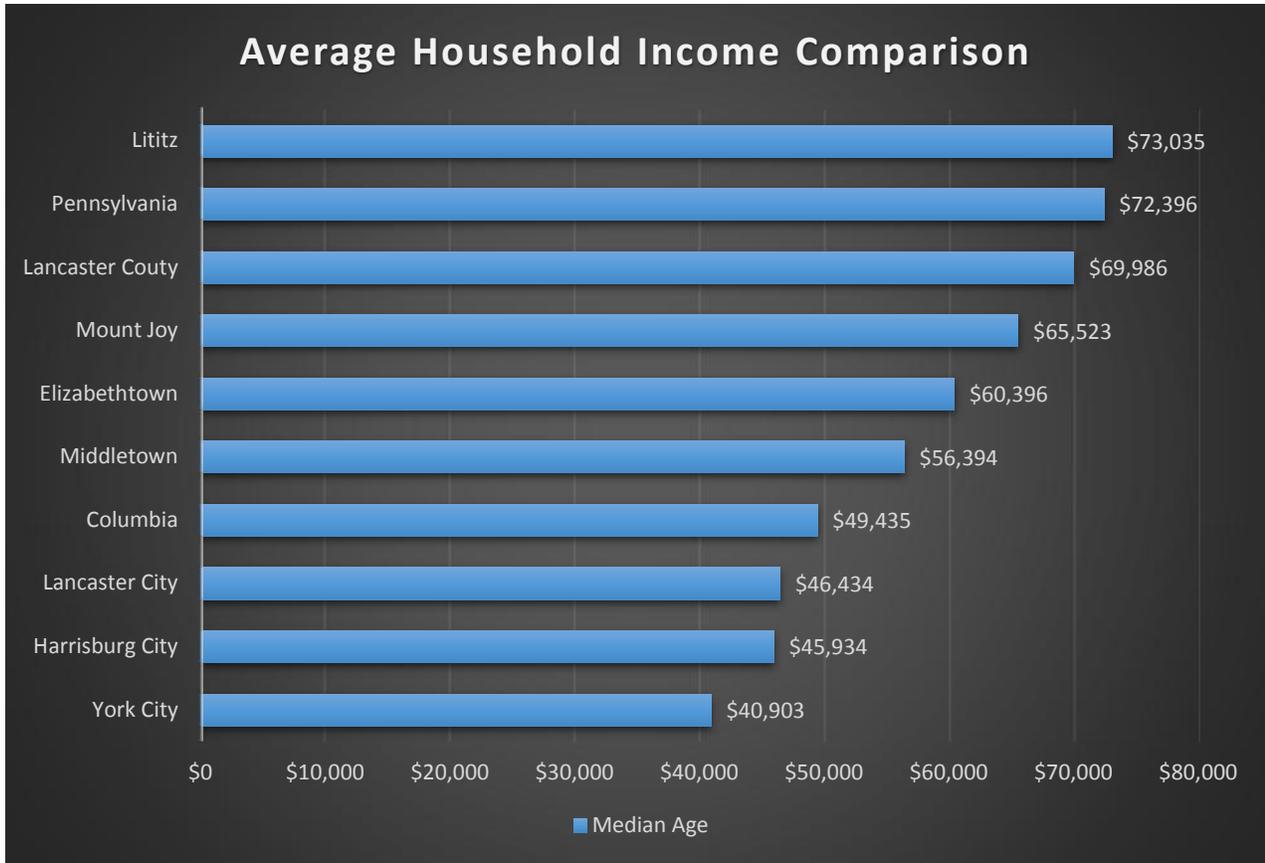


## Elizabethtown Population by Age 2016 Estimate in the 5-Minute Driveshed



Elizabethtown Borough in Comparison to Other Regional Communities, Counties, and the Commonwealth





### Psychographic Profile

Businesses in the downtown can more effectively reach their target audience when they understand both demographics and psychographics. Demographics are the average or typical characteristics of your target market — the people who buy your products or services. These characteristics might include age, annual income, educational attainment, type of occupation, region of the country they live in, or number of individuals living in a household. Demographics can also include the age of children, status of home ownership, value of the average home, and whether that home is in an urban or rural location. Psychographics is the study of personality, values, attitudes, interests, and lifestyles.

While demographics help to explain “who” the trade area consumers are, psychographics bring clarity to “why” they buy. Research led to the construction of profiles of a person or group's psychographic make-up – what we refer to as a "psychographic profile". Psychographic profiles are the foundation of market segmentation. Market segmentation, in turn, is the first step in defining and selecting a target market to pursue. Basically, market segmentation is the process of splitting an overall market into two or more groups of consumers. Each group (or market segment) should be similar in terms of certain characteristics or product needs. According to one of the largest consumer research companies, Nielsen, “Segmentation provides your organization with a foundation for understanding your customers, your competitors, as well as, providing a view of the marketplace in general.”

Nielsen created their "lifestyle segmentation" system called Nielsen PRIZM® over 30 years ago. It classifies U.S. households into one of 66 categories based on U.S. Census data, leading consumer surveys and compiled household files, and other public and private sources of demographic and consumer information. Market

segmentation operates on the principle that "birds of a feather flock together." It's a worldwide phenomenon that people with similar cultural backgrounds, needs, and perspectives naturally gravitate toward one another.

Nielsen PRIZM® Premier is the latest iteration of Nielsen’s consumer segmentation products. PRIZM® Premier defines every U.S. household as one of 68 demographic and behavior types, or segments. The new model features measures of technology behavior and household assets. The introduction of these key drivers enables the creation of segments that reflect how today’s households have embraced technology and how they have weathered the economic shifts in recent years. A listing of Nielsen Segmentation Characteristics is provided in Appendix A of this Report.

According to Nielsen, “to put the country’s marketplace into perspective: today, there are more than 313+ million people living in more than 118+ million households located in over 200,000 neighborhoods, or Census block groups, across the country. Companies use this information to break through the country’s crowded marketplace and understand, locate and reach their customers better. They use it to determine what type of advertising to create and where it should appear, where to put new stores, what kind of merchandising and products to put in their stores, etc.”

For the purposes of this study, both the Nielsen PRIZM® and Nielsen PRIZM® Premier segmentation information is offered as additional layers of qualitative information (based on quantitative data) that can aid in both the Borough’s and business owner’s understanding of the consumers and markets served by the downtown.

**The following are some of the characteristics of the five Nielsen PRIZM® segmentations most commonly found within the Elizabethtown Area’s 17022 Zip Code.**

<b>Fast-Track Families</b>	
<b>Upscale Middle Age w/ Kids</b>	
<p>With their upscale incomes, numerous children, and spacious homes, Fast-Track Families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems, and video games. They take advantage of their rustic locales by camping, boating, and fishing.</p>	
<b>Demographic Traits</b>	<b>Lifestyle &amp; Media Traits</b>
Urbanicity: Town/Rural	<ul style="list-style-type: none"> <li>• Order from gap.com</li> </ul>
Income: Upscale	<ul style="list-style-type: none"> <li>• Vacation at beach</li> </ul>
Age Ranges: Age 35-54	<ul style="list-style-type: none"> <li>• Read National Geographic Kids</li> </ul>
Presence of Kids: HH w/ Kids	<ul style="list-style-type: none"> <li>• Watch Grey's Anatomy</li> </ul>
Homeownership: Mostly Owners	<ul style="list-style-type: none"> <li>• GMC Yukon XL Flex Fuel</li> </ul>
Employment Levels: Management and Professional	
Education Levels: Graduate Plus	
Ethnic Diversity: White, Asian, Hispanic, Mix	

## Country Casuals

### Upscale Older w/o Kids

There's a laid-back atmosphere in Country Casuals, a collection of older, upscale households that have started to empty-nest. Many households boast two earners who have well-paying management jobs or own small businesses. Today, these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares, and going out to eat.

Demographic Traits	Lifestyle & Media Traits
Urbanicity: Town/Rural	• Shop at Eddie Bauer
Income: Upscale	• Buy collectibles online
Age Ranges: Age 45-64	• Read Backpacker
Presence of Kids: HH w/o Kids	• Watch The Big Bang Theory
Homeownership: Mostly Owners	• Chevrolet Corvette
Employment Levels: Management and Professional	
Education Levels: Graduate Plus	
Ethnic Diversity: White	

## Middleburg Managers

### Upper Mid Older w/o Kids

Middleburg Managers arose when empty nesters settled in satellite communities, which offered a lower cost of living and more relaxed pace. Today, segment residents tend to be middle class with solid white-collar jobs or comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening, and refinishing furniture.

Demographic Traits	Lifestyle & Media Traits
Urbanicity: Second City	• Shop at Pottery Barn
Income: Upper Mid	• Vacation on cruise
Age Ranges: Age 55+	• Read Travel + Leisure
Presence of Kids: HH w/o Kids	• Watch Washington Week
Homeownership: Mostly Owners	• Hyundai Elantra Touring
Employment Levels: Mix	
Education Levels: College Graduate	
Ethnic Diversity: White	

## Traditional Times

### Upper Mid Mature w/o Kids

Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically, in their fifties and older, these upper-middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles like Country Living and Country Home. But they're big travelers, especially in recreational vehicles and campers.

Demographic Traits	Lifestyle & Media Traits
Urbanicity: Town/Rural	• Shop at Sam's Club
Income: Upper Mid	• Contribute to PBS
Age Ranges: Age 65+	• Read Southern Living
Presence of Kids: HH w/o Kids	• Watch Antiques Roadshow
Homeownership: Mostly Owners	• Toyota Avalon
Employment Levels: Mostly Retired	
Education Levels: College Graduate	
Ethnic Diversity: White	

## Mayberry-ville

### Upper Mid Older w/o Kids

Middleburg Managers arose when empty nesters settled in satellite communities, which offered a lower cost of living and more relaxed pace. Today, segment residents tend to be middle class with solid white-collar jobs or comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening, and refinishing furniture.

Demographic Traits	Lifestyle & Media Traits
Urbanicity: Town/Rural	• Shop at Sears Hardware
Income: Upper Mid	• Go hunting
Age Ranges: Age 45-64	• Read American Hunter
Presence of Kids: HH w/o Kids	• Watch NASCAR
Homeownership: Mostly Owners	• GMC Sierra Diesel
Employment Levels: Mix	
Education Levels: College Graduate	
Ethnic Diversity: White	

The following are some of the characteristics of the five Nielsen PRIZM® Premium segmentations most commonly found within the Elizabethtown Area's 17022 Zip Code.

<b>New Homesteaders</b>		
<b>Upscale Younger Mostly w/ Kids</b>		
<p>Young, upper-middle-class families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships. With a mix of jobs in white and blue-collar industries, these dual-income couples have fashioned comfortable, child-centered lifestyles; their driveways are filled with campers and powerboats, their house with the latest technological gadgets and hunting gear.</p>		
<b>Demographic Traits</b>		<b>Lifestyle &amp; Media Traits</b>
Urbanicity:	Town	<ul style="list-style-type: none"> <li>Owns a Subaru</li> </ul>
Income:	Upscale	<ul style="list-style-type: none"> <li>Eats at Cold Stone Creamery</li> </ul>
Household Technology:	Above Average	<ul style="list-style-type: none"> <li>Shops at Justice</li> </ul>
Income Producing Assets:	High	<ul style="list-style-type: none"> <li>Goes hunting</li> </ul>
Age Ranges:	Age 25-44	<ul style="list-style-type: none"> <li>Flies Frontier</li> </ul>
Presence of Kids:	Mostly w/ Kids	
Homeownership:	Mostly Owners	
Employment Levels:	Management and Professional	
Education Levels:	College Graduate	

<b>Pickup Patriarchs</b>		
<b>Upscale Older Mostly w/o Kids</b>		
<p>Pickup Patriarchs, an upscale segment found in exurban areas, are country chic. They live in areas that are somewhat rural but they have more suburban tastes. They are frequent golfers and boaters, heavy shoppers and savvy investors.</p>		
<b>Demographic Traits</b>		<b>Lifestyle &amp; Media Traits</b>
Urbanicity:	Town	<ul style="list-style-type: none"> <li>Owns a Kia</li> </ul>
Income:	Upscale	<ul style="list-style-type: none"> <li>Eats at Bob Evans</li> </ul>
Household Technology:	Average	<ul style="list-style-type: none"> <li>Shops at Eddie Bauer</li> </ul>
Income Producing Assets:	High	<ul style="list-style-type: none"> <li>Goes boating</li> </ul>
Age Ranges:	Age 45-64	<ul style="list-style-type: none"> <li>Stays at Radisson</li> </ul>
Presence of Kids:	Mostly w/o Kids	
Homeownership:	Mostly Owners	
Employment Levels:	Management and Professional	
Education Levels:	College Graduate	

## White Picket Fences

### Midscale Younger Family Mix

Residents in White Picket Fences look a lot like the stereotypical American household of a generation ago: upper-middle-class and married with children. But the current version reflects changing patterns, with some parents just beginning to start families while others approach the empty-nest stage as their children age. They enjoy reading, following sports, and DIY projects and crafts.

#### Demographic Traits

Urbanicity:	Town
Income:	Midscale
Household Technology:	Above Average
Income Producing Assets:	Low
Age Ranges:	Age 25-44
Presence of Kids:	Family Mix
Homeownership:	Mix
Employment Levels:	Mix
Education Levels:	College Graduate

#### Lifestyle & Media Traits

- Owns an Acura
- Eats at Logan's Roadhouse
- Shops at Books-a-Million
- Follows minor league baseball
- Visits the Bahamas

## Traditional Times

### Upper Mid Mature w/o Kids

Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically age 55 and older, these midscale Americans pursue an active lifestyle. They belong to country clubs and civic clubs and spend their vacation time traveling by motor home.

#### Demographic Traits

Urbanicity:	Town
Income:	Upper Mid
Household Technology:	Below Average
Income Producing Assets:	Elite
Age Ranges:	Age 65+
Presence of Kids:	HH w/o Kids
Homeownership:	Homeowners
Employment Levels:	Mostly Retired
Education Levels:	Graduate Plus

#### Lifestyle & Media Traits

- Owns a Buick
- Eats at Bonefish Grill
- Shops at Chico's
- Follows PGA/LPGA
- Visits Alaska

<b>Crossroad Villagers</b>	
<b>Downscale Mature w/o Kids</b>	
With a population of retired seniors, Crossroads Villagers is a classic small town lifestyle. Residents are high school-educated, with downscale incomes and modest housing. They enjoy the occasional dinner out and are frequent cruise vacationers.	
<b>Demographic Traits</b>	<b>Lifestyle &amp; Media Traits</b>
Urbanicity: Town	• Owns a Buick
Income: Downscale	• Eats at Bob Evans
Household Technology: Lowest	• Shops at Stein Mart
Income Producing Assets: Below Average	• Follows figure skating
Age Ranges: Age 65+	• Visits Alaska
Presence of Kids: HH w/o Kids	
Homeownership: Mostly Owners	
Employment Levels: Mostly Retired	
Education Levels: High School	

**Understanding Consumer Spending Potential**

The Nielsen Claritas Data reports obtained (from LCPC) for the Downtown Elizabethtown drive time areas shows 2016 estimated amounts spent by households within the defined drive time areas. The reports provide expenditure totals for various consumer product groups, including apparel, entertainment, food at home, healthcare, household equipment, transportation, and more. By understanding what consumers within the Downtown Elizabethtown driveshed are spending their money on local business owners can make better marketing and location planning and growth decisions.

Nielsen's Retail Market Power data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey or CEX), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates.

**Retail Market Performance**

**Demand Growth Report | Total Retail Sales Including Eating and Drinking Places**

<b>5-Minute Driveshed</b>			<b>10-Minute Driveshed</b>			<b>15-Minute Driveshed</b>		
<b>2016 Demand</b>	<b>2021 Demand</b>	<b>% Growth</b>	<b>2016 Demand</b>	<b>2021 Demand</b>	<b>% Growth</b>	<b>2016 Demand</b>	<b>2021 Demand</b>	<b>% Growth</b>
\$313,352,721	\$344,219,207	9.85%	\$509,692,336	\$562,185,280	10.30%	\$899,244,997	\$1,001,927,316	11.42%

## Demand Growth Report | By Retail Store Type

### Motor Vehicle & Parts Dealers

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$61,163,557	\$64,780,472	5.91%	\$100,560,292	\$107,222,174	6.62%	\$182,410,113	\$196,432,585	7.69%
Automotive Dealers-4411		3.61%			4.26%			5.24%
Other Motor Vehicle Dealers-4412		18.17%			19.16%			20.58%
Automotive Parts/Accessories, Tire Stores-4413		16.01%			16.48%			17.59%

### Furniture & Home Furnishings Stores

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$5,870,229	\$6,637,576	13.07%	\$9,793,301	\$11,114,027	13.49%	\$17,524,361	\$20,132,646	14.88%
Furniture Stores-4421		12.82%			13.30%			14.70%
Home Furnishing Stores-4422		13.36%			13.70%			15.10%

### Electronics & Appliances Stores

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$6,094,998	\$7,862,756	29.00%	\$9,463,175	\$12,261,620	29.57%	\$16,162,622	\$21,172,704	31.00%
Electronics & Appliance Stores-44314		29.00%			29.57%			31.00%
Household Appliances Stores-443141		22.10%			22.43%			23.72%
Electronics Stores-443142		29.93%			30.61%			32.10%

## Building Material & Garden Equipment Stores

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$30,894,542	\$35,410,428	14.62%	\$51,997,843	\$59,766,301	14.94%	\$93,450,827	\$108,510,257	16.11%
Building Material & Supply Dealers-4441		14.41%			14.72%			15.91%
Home Centers-44411		14.94%			15.31%			16.60%
Paint & Wallpaper Stores-44412		12.45%			12.78%			14.19%
Hardware Stores-44413		13.39%			13.79%			14.91%
Other Building Materials Dealers-44419		14.26%			14.49%			15.61%
Building Materials, Lumberyards-444191		14.60%			14.90%			16.00%
Lawn/Garden Equip/Supplies Stores-4442		15.73%			16.19%			17.24%
Outdoor Power Equipment Stores-44421		14.88%			15.52%			16.85%
Nursery & Garden Centers-44422		16.08%			16.48%			17.42%

## Food & Beverage Stores

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$42,027,722	\$45,193,123	7.53%	\$67,919,287	\$73,271,596	7.88%	\$118,493,985	\$129,062,409	8.92%
Grocery Stores-4451		6.86%			7.25%			8.32%
Supermarkets, Grocery (Except Convenience) Stores-44511		6.69%			7.09%			8.17%
Convenience Stores-44512		9.20%			9.41%			10.31%
Specialty Food Stores-4452		5.77%			6.18%			7.22%
Beer, Wine & Liquor Stores-4453		9.48%			9.78%			10.77%

## Health & Personal Care Stores

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$15,141,294	\$16,224,781	7.16%	\$25,854,004	\$27,813,699	7.58%	\$45,947,812	\$50,103,848	9.05%
Pharmacies & Drug Stores-44611		6.58%	7.01%		8.49%			
Cosmetics, Beauty Supplies, Perfume Stores-44612		6.35%	6.79%		8.31%			
Optical Goods Stores-44613		19.47%	19.96%		21.04%			
Other Health & Personal Care Stores-44619		6.30%	6.74%		8.20%			

## Gasoline Stations

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$22,972,781	\$26,827,653	16.78%	\$36,774,634	\$43,088,550	17.17%	\$65,069,002	\$76,816,790	18.05%
Gasoline Stations with Convenience Stores-44711		16.69%			17.08%			17.96%
Other Gasoline Stations-44719		17.03%			17.43%			18.31%

## Clothing & Clothing Accessories Stores

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$14,396,484	\$16,211,746	12.61%	\$23,224,742	\$26,313,922	13.30%	\$40,610,190	\$46,510,935	14.53%
Clothing Stores-4481		9.75%			10.44%			11.46%
Men's Clothing Stores-44811		9.99%			10.63%			11.56%
Women's Clothing Stores-44812		9.46%			10.46%			11.34%
Children's, Infants' Clothing Stores-44813		9.86%			9.78%			11.41%
Family Clothing Stores-44814		9.95%			10.58%			11.62%

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
Clothing Accessories Stores-44815		9.73%			10.75%			11.61%
Other Clothing Stores-44819		8.95%			9.73%			10.75%
Shoe Stores-4482		10.18%			10.67%			11.48%
Jewelry, Luggage, Leather Goods Stores-4483		17.53%			18.14%			19.63%
Jewelry Stores-44831		18.20%			18.78%			20.31%
Luggage & Leather Goods Stores-44832		12.05%			12.71%			13.71%

### Sporting Goods, Hobby, Book, Music Stores

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$6,500,696	\$7,677,674	18.11%	\$9,941,797	\$11,760,220	18.29%	\$16,701,508	\$19,921,793	19.28%
Sporting Goods, Hobby, Musical Instrument Stores-4511		17.70%			17.88%			18.84%
Sporting Goods Stores-45111		14.08%			14.71%			15.80%
Hobby, Toys & Games Stores-45112		20.87%			20.19%			20.71%
Sewing, Needlework & Piece Goods Stores-45113		12.74%			13.02%			14.28%
Musical Instrument & Supplies Stores-45114		30.73%			32.14%			34.15%
Book, Periodical & Music Stores-4512		19.89%			20.34%			21.73%
Book Stores & News Dealers-45121		18.94%			19.23%			20.48%
Book Stores-451211		19.56%			19.98%			21.39%
News Dealers & Newsstands-451212		12.19%			12.15%			12.88%
Prerecorded Tapes, CDs, Record Stores-45122		27.07%			28.15%			29.99%

## Miscellaneous Store Retailers

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$9,057,588	\$10,484,069	15.75%	\$14,509,509	\$16,823,063	15.95%	\$25,426,176	\$29,719,254	16.88%
Florists-4531		11.91%			12.43%			13.66%
Office Supplies, Stationery, Gift Stores-4532		15.74%			15.97%			17.12%
Office Supplies & Stationery Stores-45321		19.04%			19.37%			20.60%
Gift, Novelty & Souvenir Stores-45322		12.70%			12.85%			13.93%
Used Merchandise Stores-4533		13.76%			14.01%			14.97%
Other Miscellaneous Store Retailers-4539		16.45%			16.57%			17.23%

## Non-Store Retailers

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$26,215,810	\$28,927,631	10.34%	\$42,954,853	\$47,501,373	10.58%	\$75,311,071	\$84,150,905	11.74%

## Foodservice & Drinking Places

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$38,065,044	\$40,075,458	5.28%	\$59,318,524	\$62,803,248	5.87%	\$101,580,672	\$108,799,598	7.11%
Full-Service Restaurants-7221		5.17%			5.78%			7.03%
Limited Service Eating Places-7222		5.25%			5.83%			7.03%
Special Foodservices-7223		5.28%			5.86%			7.08%
Drinking Places Alcoholic Beverages-7224		6.75%			7.41%			8.76%

## GAFO

(General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

5-Minute Driveshed			10-Minute Driveshed			15-Minute Driveshed		
2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth	2016 Demand	2021 Demand	% Growth
\$71,982,104	\$81,119,221	12.69%	\$116,498,220	\$131,659,116	13.01%	\$203,210,104	\$231,982,053	14.16%
General Merchandise Stores-452		8.45%			8.83%			9.98%
Clothing & Clothing Accessories Stores-448		12.61%			13.30%			14.53%
Furniture & Home Furnishings Stores-442		13.07%			13.49%			14.88%
Electronics & Appliance Stores-443		29.00%			29.57%			31.00%
Sporting Goods, Hobby, Book, Music Stores-451		18.11%			18.29%			19.28%
Office Supplies, Stationery, Gift Stores-4532		15.74%			15.97%			17.12%

### Sales Surplus and Leakage Estimates

The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the Downtown Elizabethtown market area. When this difference is **positive** (demand is greater than the supply), there is an **opportunity gap** for that merchandise line. When the difference is **negative** (supply is greater than demand), there is a **surplus** for that merchandise line.

### Sales Surplus and Leakage Overview | Total Retail Sales Including Eating & Drinking Places

5-Minute Driveshed		
2016 Demand Consumer Expenditures	2016 Supply Retail Sales	Opportunity Gap: Surplus / Leakage
\$313,352,721	\$137,849,464	<b>\$175,503,257</b>
10-Minute Driveshed		
2016 Demand Consumer Expenditures	2016 Supply Retail Sales	Opportunity Gap: Surplus / Leakage
\$509,692,336	\$351,038,889	<b>\$158,653,447</b>
15-Minute Driveshed		
2016 Demand Consumer Expenditures	2016 Supply Retail Sales	Opportunity Gap: Surplus / Leakage
\$899,244,997	\$552,570,769	<b>\$346,674,227</b>

Total sales estimates for the 5-, 10-, and 15-minute drivesheds show sales leakages of approximately \$175.5 million, \$158.7 million, and \$346.7 million respectively. The estimates suggest that within each of the drivesheds residents travel to purchase goods and services from businesses located outside of the respective areas. The following tables show the surplus and/or leakage for the categories within each retail category and for each store type.

<b>Retail Category   Store Type</b>	<b>5-Minute Driveshed</b>	<b>10-Minute Driveshed</b>	<b>15-Minute Driveshed</b>
<b>Motor Vehicle &amp; Parts Dealers-441</b>	<b>\$46,847,793</b>	<b>\$14,314,774</b>	<b>\$27,906,901</b>
Automotive Dealers-4411	\$43,734,948	\$11,145,403	\$24,393,414
Other Motor Vehicle Dealers-4412	\$4,644,415	\$7,492,506	\$14,943,927
Automotive Parts/Accessories, Tire Stores-4413	\$1,531,569	\$10,661,875	\$11,430,437
<b>Furniture &amp; Home Furnishings Stores-442</b>	<b>\$5,465,794</b>	<b>\$8,674,008</b>	<b>\$13,481,456</b>
Furniture Stores-4421	\$3,140,969	\$5,001,097	\$7,477,979
Home Furnishing Stores-4422	\$2,324,825	\$3,672,911	\$6,003,477
<b>Electronics &amp; Appliances Stores-443</b>	<b>\$4,038,650</b>	<b>\$5,912,317</b>	<b>\$2,022,046</b>
Electronics & Appliance Stores-44314	\$4,038,650	\$5,912,317	\$2,022,046
Household Appliances Stores-443141	\$597,380	\$515,070	\$4,743,216
Electronics Stores-443142	\$4,636,030	\$6,427,387	\$2,721,170
<b>Building Material &amp; Garden Equipment Stores-444</b>	<b>\$18,069,928</b>	<b>\$19,421,267</b>	<b>\$39,937,134</b>
Building Material & Supply Dealers-4441	\$13,537,270	\$13,187,520	\$30,123,525
Home Centers-44411	\$9,551,809	\$14,874,524	\$25,255,053
Paint & Wallpaper Stores-44412	\$402,071	\$315,418	\$869,341
Hardware Stores-44413	\$1,126,960	\$11,465,969	\$13,054,363
Other Building Materials Dealers-44419	\$4,710,350	\$9,463,547	\$17,053,493

Retail Category   Store Type	5-Minute Driveshed	10-Minute Driveshed	15-Minute Driveshed
Building Materials, Lumberyards-444191	\$1,806,250	\$3,568,546	\$6,410,062
Lawn/Garden Equipment/Supplies Stores-4442	\$4,532,658	\$6,233,747	\$9,813,609
Outdoor Power Equipment Stores-44421	\$1,380,144	\$2,368,608	\$2,122,921
Nursery & Garden Centers-44422	\$3,152,515	\$3,865,139	\$7,690,688
<b>Food &amp; Beverage Stores-445</b>	<b>\$20,822,255</b>	<b>\$11,071,538</b>	<b>\$6,847,193</b>
Grocery Stores-4451	\$34,695,167	\$33,151,782	\$31,694,092
Supermarkets, Grocery (Except Convenience) Stores-44511	\$36,296,135	\$35,800,218	\$35,683,336
Convenience Stores-44512	\$1,600,969	\$2,648,436	\$3,989,243
Specialty Food Stores-4452	\$2,456,776	\$4,525,665	\$8,287,311
Beer, Wine & Liquor Stores-4453	\$11,416,136	\$17,554,579	\$30,253,974
<b>Health &amp; Personal Care Stores-446</b>	<b>\$11,141,933</b>	<b>\$13,627,642</b>	<b>\$23,561,375</b>
Pharmacies & Drug Stores-44611	\$9,117,213	\$10,355,291	\$16,590,538
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$645,535	\$1,389,111	\$2,778,062
Optical Goods Stores-44613	\$135,046	\$76,169	\$807,487
Other Health & Personal Care Stores-44619	\$1,244,138	\$1,807,071	\$3,385,289
<b>Gasoline Stations-447</b>	<b>\$14,889,329</b>	<b>\$17,139,207</b>	<b>\$41,759,384</b>
Gasoline Stations with Convenience Stores-44711	\$9,763,577	\$8,644,973	\$27,687,501
Other Gasoline Stations-44719	\$5,125,752	\$8,494,233	\$14,071,882
<b>Clothing &amp; Clothing Accessories Stores-448</b>	<b>\$8,732,841</b>	<b>\$17,335,891</b>	<b>\$21,668,567</b>

Retail Category   Store Type	5-Minute Driveshed	10-Minute Driveshed	15-Minute Driveshed
Clothing Stores-4481	\$4,213,372	\$8,757,612	\$15,601,293
Men's Clothing Stores-44811	\$535,347	\$810,960	\$1,353,978
Women's Clothing Stores-44812	\$1,577,240	\$688,561	\$897,245
Children's, Infants' Clothing Stores-44813	\$434,552	\$739,460	\$1,315,327
Family Clothing Stores-44814	\$4,174,368	\$6,648,859	\$11,474,265
Clothing Accessories Stores-44815	\$338,814	\$538,756	\$933,268
Other Clothing Stores-44819	\$307,530	\$708,137	\$1,421,700
Shoe Stores-4482	\$1,196,268	\$1,919,553	\$3,251,862
Jewelry, Luggage, Leather Goods Stores-4483	\$3,323,201	\$6,658,726	\$2,815,413
Jewelry Stores-44831	\$2,757,980	\$5,757,633	\$1,253,333
Luggage & Leather Goods Stores-44832	\$565,221	\$901,094	\$1,562,080
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	<b>\$4,389,495</b>	<b>\$6,715,863</b>	<b>\$11,743,167</b>
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$3,254,613	\$5,123,117	\$9,723,064
Sporting Goods Stores-45111	\$1,146,035	\$1,865,872	\$4,654,521
Hobby, Toys & Games Stores-45112	\$1,332,598	\$2,122,547	\$3,341,367
Sewing, Needlework & Piece Goods Stores-45113	\$404,499	\$661,595	\$1,061,554
Musical Instrument & Supplies Stores-45114	\$371,481	\$473,103	\$665,621
Book, Periodical & Music Stores-4512	\$1,134,882	\$1,592,746	\$2,020,103
Book Stores & News Dealers-45121	\$993,975	\$1,386,478	\$2,118,084

Retail Category   Store Type	5-Minute Driveshed	10-Minute Driveshed	15-Minute Driveshed
Book Stores-451211	\$904,627	\$1,247,714	\$1,881,619
News Dealers & Newsstands-451212	\$89,348	\$138,764	\$236,465
Prerecorded Tapes, CDs, Record Stores-45122	\$140,907	\$206,268	\$97,981
<b>General Merchandise Stores-452</b>	<b>\$33,292,548</b>	<b>\$10,204,027</b>	<b>\$24,529,305</b>
Department Stores Excluding Leased Departments-4521	\$13,170,739	\$16,789,986	\$4,677,346
Other General Merchandise Stores-4529	\$20,121,810	\$26,994,013	\$29,206,650
<b>Miscellaneous Store Retailers-453</b>	<b>\$8,118,887</b>	<b>\$11,733,776</b>	<b>\$20,801,813</b>
Florists-4531	\$64,873	\$255,666	\$362,993
Office Supplies, Stationery, Gift Stores-4532	\$4,080,208	\$6,137,292	\$10,756,566
Office Supplies & Stationery Stores-45321	\$1,996,946	\$3,200,743	\$5,520,877
Gift, Novelty & Souvenir Stores-45322	\$2,083,262	\$2,936,549	\$5,235,689
Used Merchandise Stores-4533	\$630,907	\$730,555	\$1,331,339
Other Miscellaneous Store Retailers-4539	\$3,342,899	\$4,610,263	\$8,350,915
<b>Non-Store Retailers-454</b>	<b>\$22,675,104</b>	<b>\$37,396,525</b>	<b>\$61,949,881</b>
<b>Foodservice &amp; Drinking Places-722</b>	<b>\$18,663,206</b>	<b>\$35,879,234</b>	<b>\$54,510,093</b>
Full-Service Restaurants-7221	\$7,615,582	\$13,408,889	\$21,502,361
Limited Service Eating Places-7222	\$5,257,929	\$13,582,538	\$26,041,714
Special Foodservices-7223	\$4,137,016	\$6,391,320	\$3,239,540
Drinking Places Alcoholic Beverages-7224	\$1,652,680	\$2,496,488	\$3,726,479

Retail Category   Store Type	5-Minute Driveshed	10-Minute Driveshed	15-Minute Driveshed
<b>GAFO*</b>	<b>\$59,999,536</b>	<b>\$54,979,396</b>	<b>\$80,157,013</b>
General Merchandise Stores-452	\$33,292,548	\$10,204,027	\$24,529,305
Clothing & Clothing Accessories Stores-448	\$8,732,841	\$17,335,891	\$21,668,567
Furniture & Home Furnishings Stores-442	\$5,465,794	\$8,674,008	\$13,481,456
Electronics & Appliance Stores-443	\$4,038,650	\$5,912,317	\$2,022,046
Sporting Goods, Hobby, Book, Music Stores-451	\$4,389,495	\$6,715,863	\$11,743,167
Office Supplies, Stationery, Gift Stores-4532	\$4,080,208	\$6,137,292	\$10,756,566

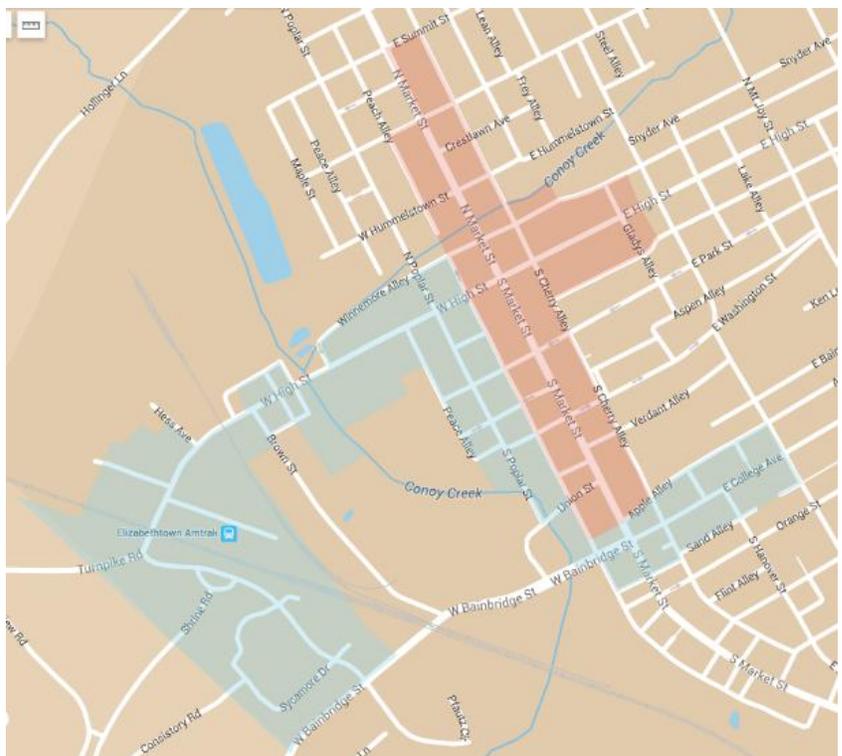
\*GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

## PROPERTY & BUSINESS INVENTORY

### Introduction

In June 2015, the Borough of Elizabethtown entered into a Memorandum of Understanding (MOU) with the Elizabethtown Area Chamber of Commerce (EACC). The purpose of the MOU was to “create a part-time position within the EACC to assist with the implementation of a developing Borough initiative focusing on Downtown Elizabethtown.”

**Primary among the responsibilities of the EACC was to create and maintain a comprehensive and up to date registry of commercial spaces within the Central Business District and Mixed-Use zoning districts as defined on the Borough’s Zoning Map shown here in red and green respectively.**



Soon after the hiring of a part-time Downtown Business Development Specialist (DBDS), the EACC created a new Downtown Business Committee to work with the DBDS to carry out the tasks contained in the MOU. The Downtown Business Committee quickly got to work – first by defining the following vision, purpose and responsibilities of the committee:

<b>Committee Vision</b>	Downtown Elizabethtown is the vibrant core of small business growth and development in northwest Lancaster County attracting both consumers and investors to its flourishing commercial district.
<b>Committee Purpose</b>	The purpose of the Downtown Business Committee is to ensure the long-term economic vitality of downtown Elizabethtown.
<b>General Responsibilities</b>	<ul style="list-style-type: none"> <li>• Gather and interpret market information for use in creating and implementing a strategic economic development work plan for the downtown.</li> <li>• Monitor the economic health and performance of the district.</li> <li>• Engage downtown business and property owners to gain insight into the health of the commercial district and to collaborate on strategic initiatives.</li> <li>• Serve as both an advocate for all downtown business and property owners and a catalyst for improvement through policy, planning, programs, and projects.</li> <li>• Work both to support and strengthen existing downtown businesses and to recruit additional businesses that enhance the mix of commercial offerings</li> <li>• Identify new market opportunities for the downtown. Find new uses for and stimulate investment in vacant and/or underutilized properties.</li> <li>• Collaborate with community and regional partners toward positive marketing and promotion of the downtown.</li> <li>• Monitor community and consumer perceptions of the downtown. Seek to reverse negative attitudes and build on positive ones through the implementation of a proactive communication plan.</li> <li>• Build a network of organizational and individual volunteers to participate in implementation of the economic development work plan for the downtown.</li> </ul>

Membership on the Downtown Business Committee is open to all businesses and individuals who share the vision of the Downtown Business Committee and want to collaborate with others toward a thriving downtown. The initial committee members included:

- Susan Zeager: Whippoorwill Handcrafted Items, Gifts & Stationery / Brandt’s Farm Supply
- Andrew Shelly: Andrew Douglas Jewelry
- Ryan Bracken: Folklore Coffee & Company
- Matt Denlinger: Elizabethtown Sporting Goods
- Christina Kyllonen: The Fancy Unicorn Boutique
- Nancy M. Landis: Winters Heritage House Museum

The DBDS worked with the Committee of downtown business owners to communicate their efforts to the property and business owners in the downtown study area. In the initial communication piece mailed to all property and business owners, the committee laid out their approach to the work of implementing the MOU. The following is taken directly from that piece:

## Focus on Downtown...Economics

There are no silver bullets when it comes to strengthening a downtown business district. The economic revitalization process must be incremental and well planned. The work must engage both the public and private sectors of the community, each of which bring unique resources necessary for success.

Here's the reality:

- For real estate values to appreciate, building owners must generate increased revenue through rents, other income, or earnings potential.
- Business owners can only afford to pay higher rents when sales are good...and economic activity must increase in the district for sales revenue to rise.

Bottom Line...To be effective, the Downtown Business Committee (DBC) will be undertaking revitalization initiatives in the following areas that address both areas of economic impact: commerce and real estate:

- **Market Intelligence**

Elizabethtown's effort to create positive economic change by attracting investment to the downtown must be built upon a solid understanding of the downtown and its market. DBC's first work item will be to gather and review all available information in order to identify the strengths and weaknesses of the downtown focus area. DBC members, assisted by Elizabethtown College students, will start by developing both a property and a business database during the month of November. With data in hand, DBC members will discuss local market conditions, identify areas of opportunity, and design strategies to help the downtown and its businesses build on these opportunities.

- **Business Retention**

Successful downtown development efforts start by working with existing businesses. DBC's retention efforts will be guided by the objectives of providing the encouragement, information, training, and tools that will help our existing businesses achieve growth and sustainability.

- **Business Recruitment**

Business recruitment and retention go hand-in-hand. With an understanding of the downtown and our market, DBC will implement strategies to create the optimal environment for business recruitment. The work plan will include the development of meaningful incentives as well as identifying complimentary businesses and business clusters.

- **Communication**

All of DBC's efforts – including property and business owner outreach as well as business retention and recruitment will seek to apply a balanced mix of high-tech and high-touch techniques to connect with people and cultivate relationships and to promote and distinguish downtown Elizabethtown.

The Downtown Property and Business Inventory is an economic development tool that the community will use to strengthen the health and vitality of Downtown Elizabethtown. The desire to understand business mix and needs in the downtown is the driving force behind the effort. Through surveying property and business owners, the inventory thoroughly documents valuable information in the downtown area, including business mix, square footage, vacancy rates, market data, and more.

An inventory of the buildings and businesses in the core commercial district provides a baseline for better understanding the existing assets and challenges in the downtown market, and aids in developing priorities and strategies to prepare for growth. Compiling information on downtown properties and businesses aids in the development of a database that can generate statistics and comparative summary information for economic development initiatives. The outcome of a building-by-building survey of all business spaces is a powerful tool that will be used to better understand existing and potential commercial categories, future leasing opportunities, and gaps in the market.

## **Overview of Data Development: Process & Methodology**

### **October 2015**

- Formation of the Downtown Business Committee
- Market Intelligence – DBC Work Planning using volunteer-based approach
- Secured initial data set from Borough
- Outreach to communities effectively utilizing database information for Business Retention, Expansion and Recruitment.

### **November 2015**

- Initial development of Excel database
- Incorporation of additional property information – from Lancaster County IT/GIS resources (by parcel)
- Research/Development of Property and Business Data collection forms (data merge forms)
- Development and production of initial communication materials to Property Owners and Business Owners
- Mailing initial communication (2 separate lists) to all Parcels and Property Owners (non-matching address)
- Development of Maps (Zones, Blocks, Lots)
- Finalize Property and Business Data collection forms and conduct data merge to create all documents
- Training of all data collection volunteers (six sessions)

### **December 2015**

- Development of Zone Team Binders for data collection
- Supporting Zone Teams during initial data collection activities
  - Walking each block, viewing every parcel
  - Confirming parcel use and basic building information
  - Collecting basic information on business in operation

### **January – February 2016**

- Training of new student volunteers
- Zone Teams data collection activities (limited time)
- Research / Development of Survey Instruments
  - Business Owners
  - Consumers

### March 2016

- Finalize Business Owner Surveys – Full Written Version and Online Version
- Finalize Consumer Survey – online version with logic to accommodate target markets
- Final data collection by student volunteers
- Collection of Zone Team Binders. Transfer of information into database

### April 2016

- Test Business Owner Surveys – Online Version sent to 60 businesses that we were able to secure email addresses for through data collection. 33 responses to date.
- Test Consumer Survey – Online Version with logic to accommodate target markets. Feedback from volunteers to improve the survey instrument.
- Plan consumer survey activity for Masonic Village residents

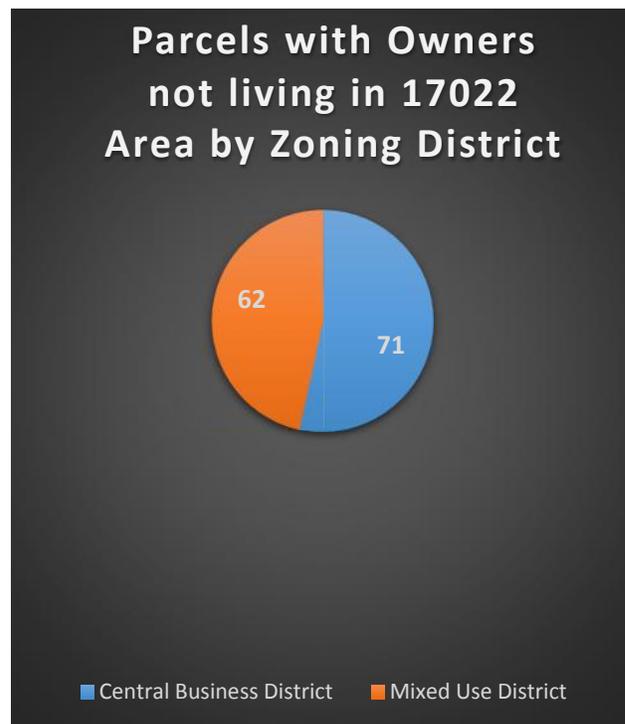
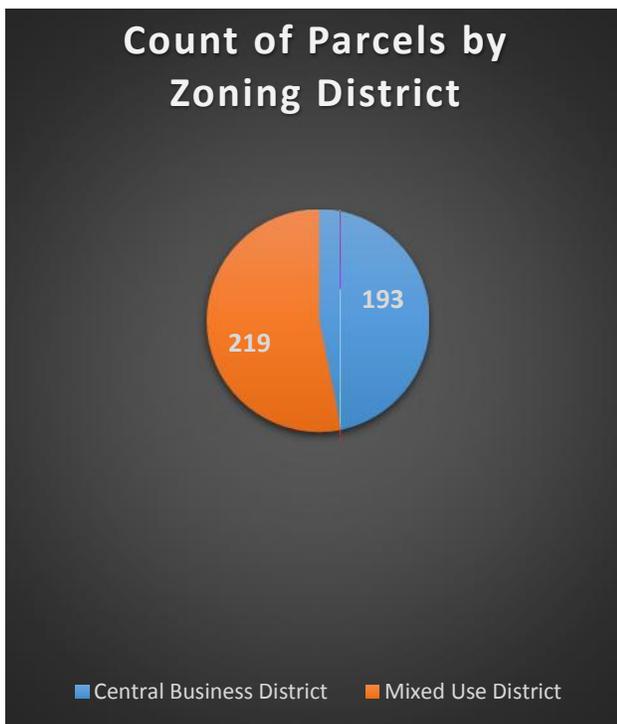
### May 2016

- Finish property/business data transfer from written forms to database
- Initiate conversation with County Planning and GIS staff to determine capacity to use GIS with database
- Incorporation of additional property information – from Lancaster County Property Assessment resources. Each parcel viewed independently and only select information transferred to database.

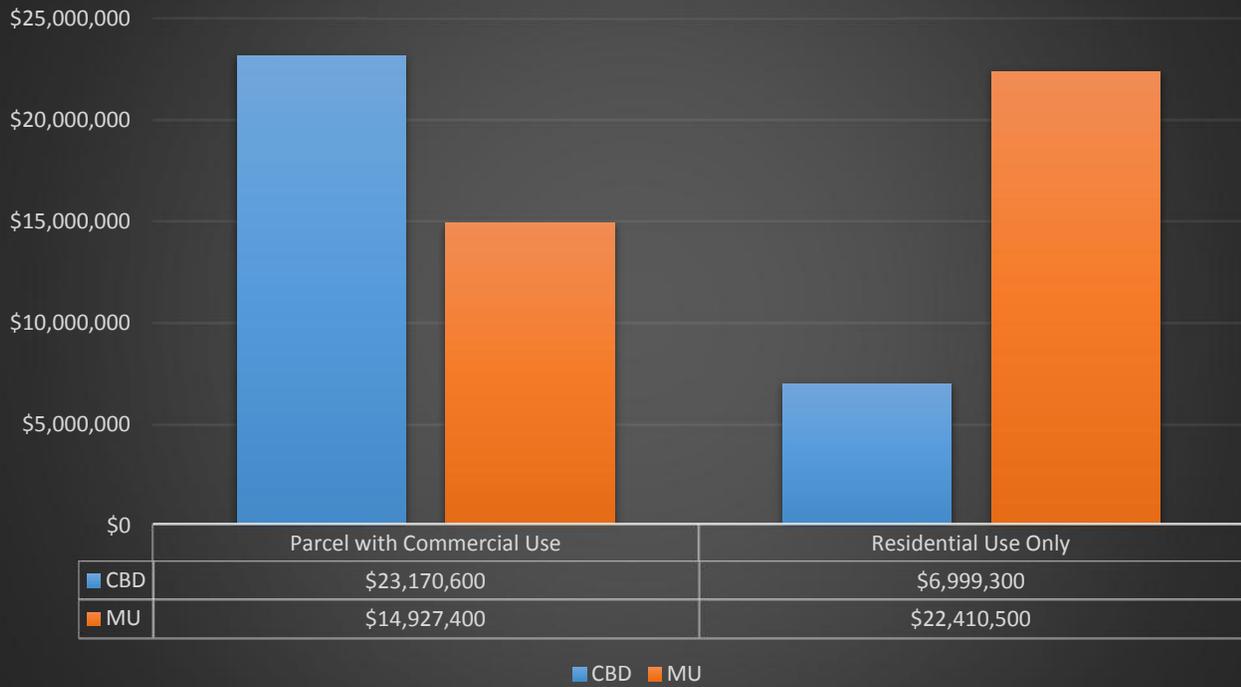
### June-July 2016

- Implement consumer survey activity for Masonic Village residents
- Finalize data collection and review
- Resend Business Owner Survey to downtown businesses (via email).

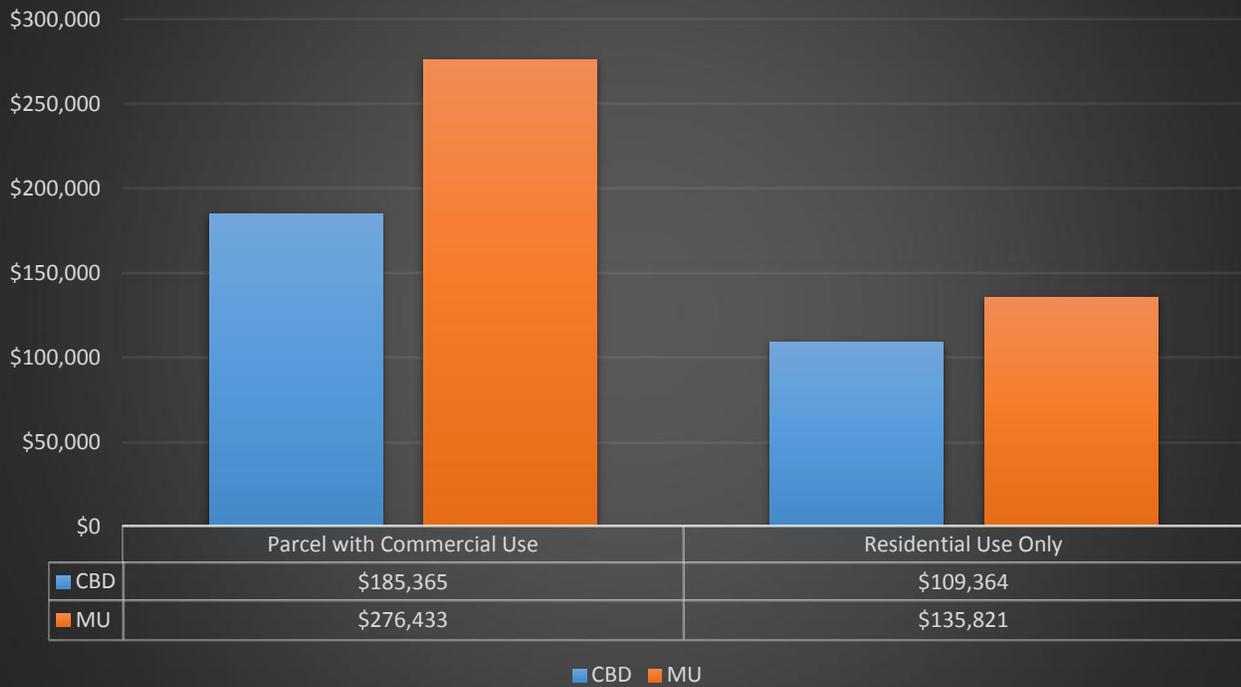
## Property & Business Inventory Quick Facts



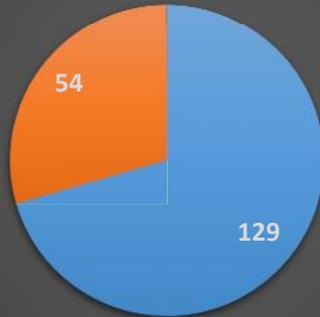
## Total Assessment Value



## Average Assessment Value

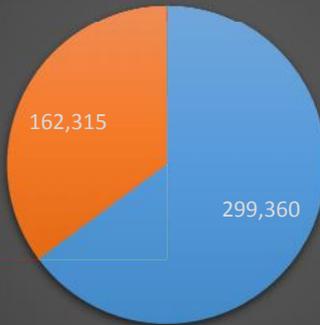


### Number of Commercial Uses by Zoning District



■ Central Business District ■ Mixed Use District

### Ground Floor Area of Commercial Uses by Zoning District



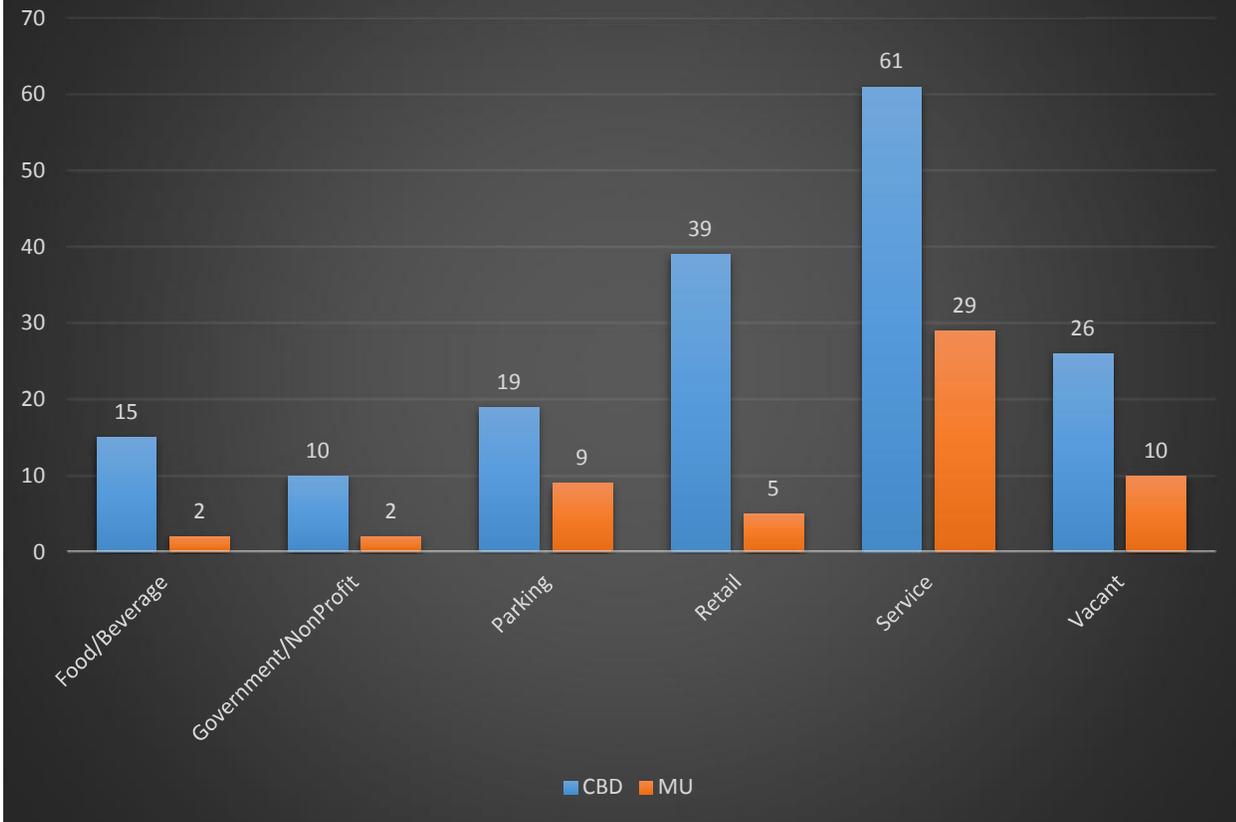
■ Central Business District ■ Mixed Use District

### Average Ground Floor Area of Commercial Uses by Zoning District



■ Central Business District ■ Mixed Use District

## Commercial Entities in each Zoning District



Business Types Per Category	CBD	MU
<b>Food/Beverage</b>		
Bar/Restaurant		1
Brew Pub/Restaurant	1	1
Private Club	1	
Restaurant	10	
Restaurant-Limited Services	3	
<b>Government/Non-Profit</b>		
Association		1
Church	5	
Historical Society/Museum	2	1
Library	1	
US Post Office	1	
(blank)	1	
<b>Retail</b>		
Automotive		1
Building Supplies	1	2
Convenience Store	1	

<b>Business Types Per Category</b>	<b>CBD</b>	<b>MU</b>
Education/Enrichment	2	
Florist	1	
Furniture Repair	1	
Jewelry	1	
Specialty Retail	8	
Sporting Goods		2
Sports Equipment	1	
Thrift/Consignment Retail	2	
Variety Retail	20	
<b>Service</b>		
Appliances / Hardware	1	
Attorney	1	1
Bank	2	
Bank-Drive Thru	1	
Beauty Salon/Barber	7	1
Catering		1
Clothing Cleaners/Tailors	1	1
Computers/Business Equipment	1	
Contractors	1	1
Education/Enrichment	1	1
Engineering	1	
Financial/Accounting	8	3
Fitness and Recreation	1	
Funeral Services	2	
Health Services	2	4
Health Services / Counseling	2	
Heating & Cooling	1	
Home Improvement/Repair	1	
Instrument Repair Services		1
Insurance	5	
Laundromat	1	
Machine Services		1
Marketing Design Firm		1
Marketing/Advertising		2
Medical	1	1
Newspaper Publisher	1	
Personal Care Services	1	
Pet Services	1	
Photography	1	
Plumbing	1	
Printing Services		3
Real Estate Services	5	
Rental Property Management	1	

<b>Business Types Per Category</b>	<b>CBD</b>	<b>MU</b>
Rental Space	1	
Storage Facility		1
Telephone Services	2	
Transportation		1
Upholstery	1	
Web Design/Computer Services	1	
Orthodontist		1
<b>Parking</b>		
	<b>19</b>	<b>9</b>
<b>Vacant</b>		
	<b>26</b>	<b>10</b>

## BUSINESS & CONSUMER DATA

As described in the earlier section, another goal of the MOU between the Borough and EACC was to prepare a questionnaire to owners of businesses and building downtown to secure additional data relevant to the health of the commercial core and suggestions for new policies and programming to aid in the growth and sustainable development of the downtown. The Downtown Business Committee worked to develop three types of survey instruments:

### Online Consumer Survey

- We tested the original online survey and made adjustments based on direct feedback.
- To date, we have received over 200 responses... a summary report is included in this document.
- We will continue through the early Fall 2016 to capture targeted market information (e.g., Masonic Village residents and Elizabethtown College students)
- We will continue to partner with local organizations to get the general online consumer survey instrument out to the general public.
- We will consider a point of sale consumer survey for future implementation directly through downtown businesses.

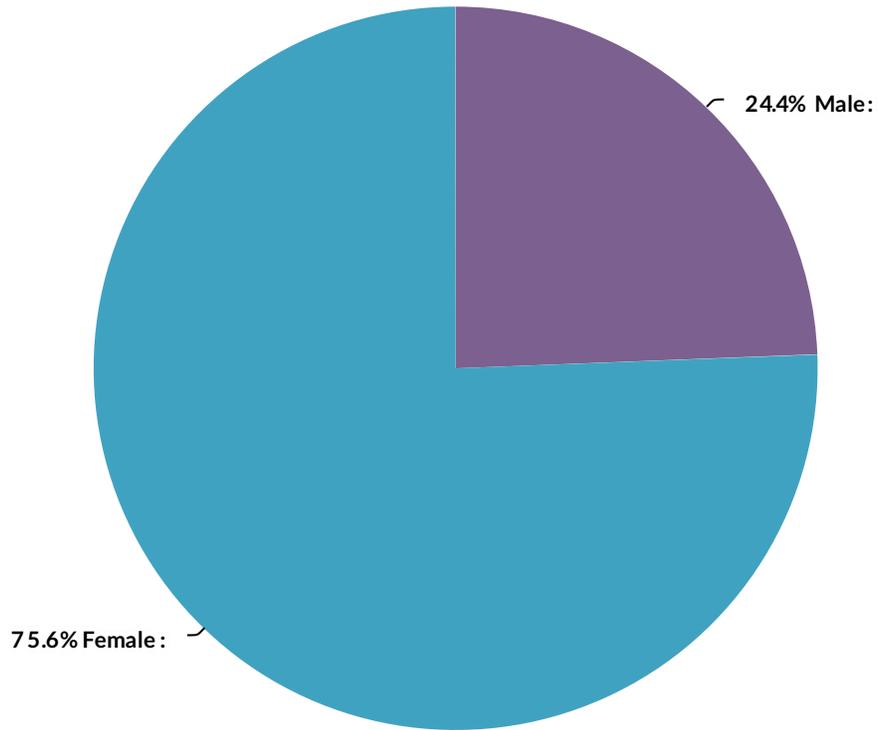
### Online and In-depth Business Owner Survey

- We tested the original online survey and made adjustments based on direct feedback.
- To date, we have received over 30 responses... a summary report is included in this document.
- We will continue to secure business owner contact (email) information and reach out to ask for their participation
- We will consider implementation of a business visitation effort to secure the more detailed information required through the (written) In-depth Business Owner survey instrument. A copy of In-depth Business Owner survey is included in Appendix B.

A summary of the results to date of both the Online Consumer Survey and the Online Business Owner Survey follow. All comments provided by survey respondents are included.

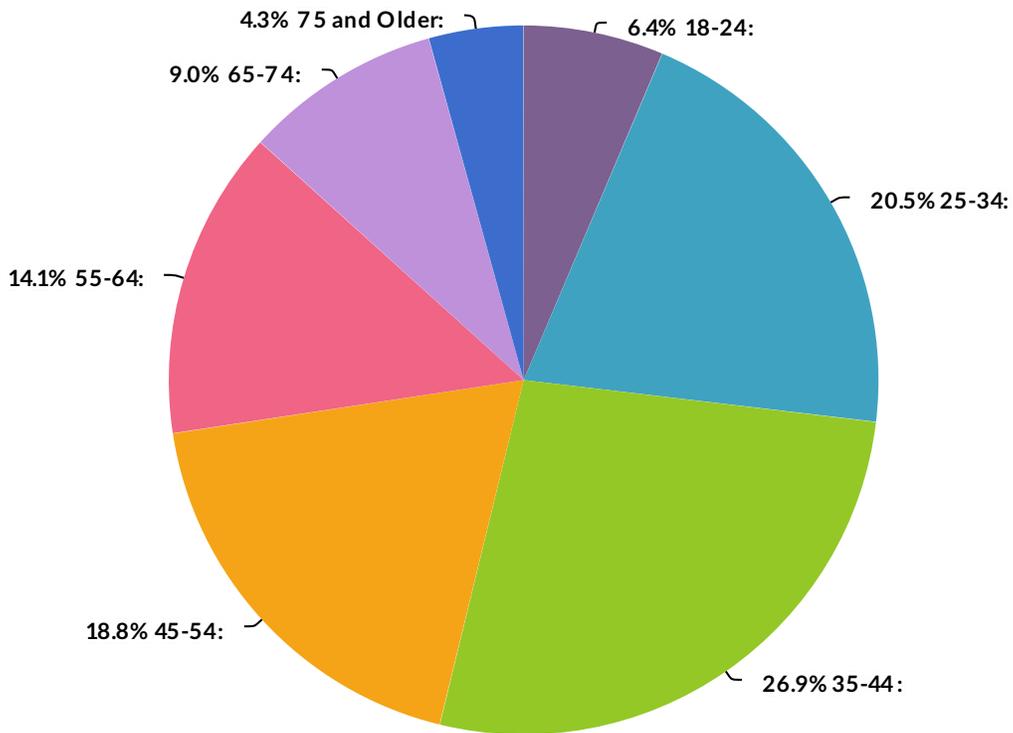
# Report for Dtwm Etwm Spring 2016 - General Consumer Survey Instrument

## 1. What is your gender?



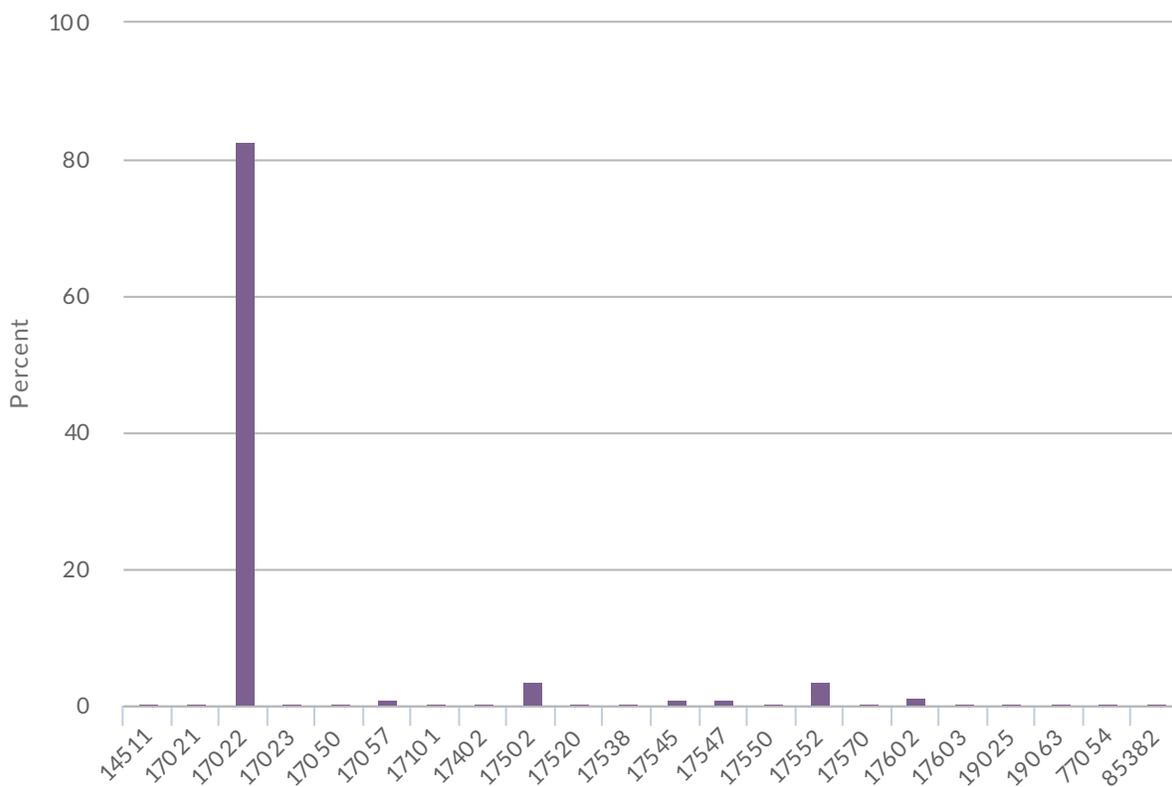
Value	Percent		Count
Male	24.4%		57
Female	75.6%		177
Total			234

## 2. What is your age?

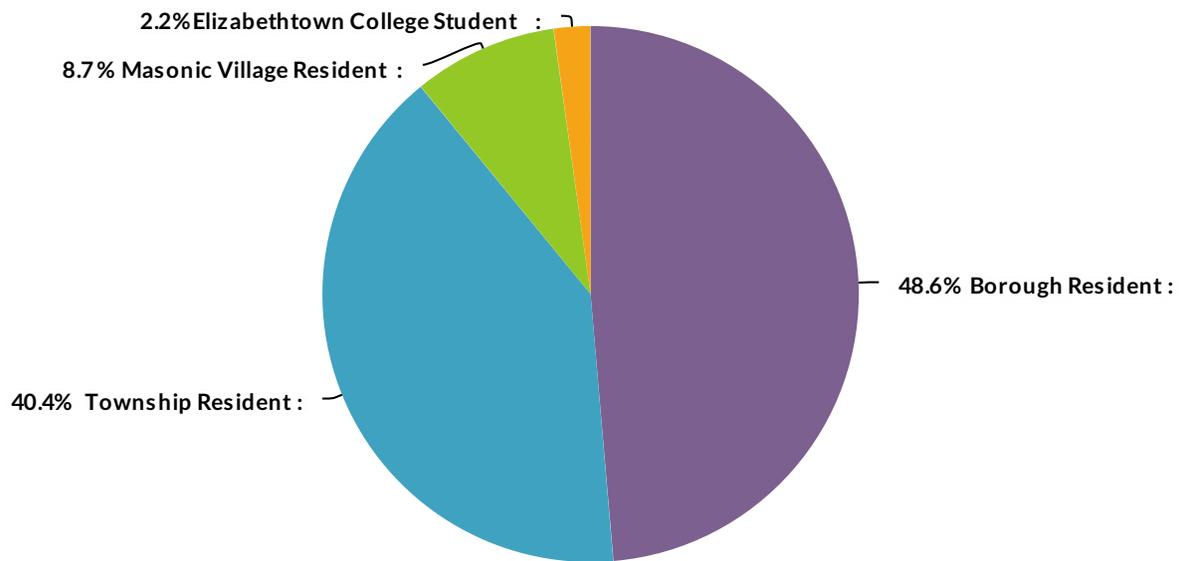


Value	Percent	Count
18-24	6.4%	15
25-34	20.5%	48
35-44	26.9%	63
45-54	18.8%	44
55-64	14.1%	33
65-74	9.0%	21
75 and Older	4.3%	10
<b>Total</b>		<b>234</b>

### 3. What is your ZIP Code?(If you are a student at Elizabethtown College... please enter 17022)

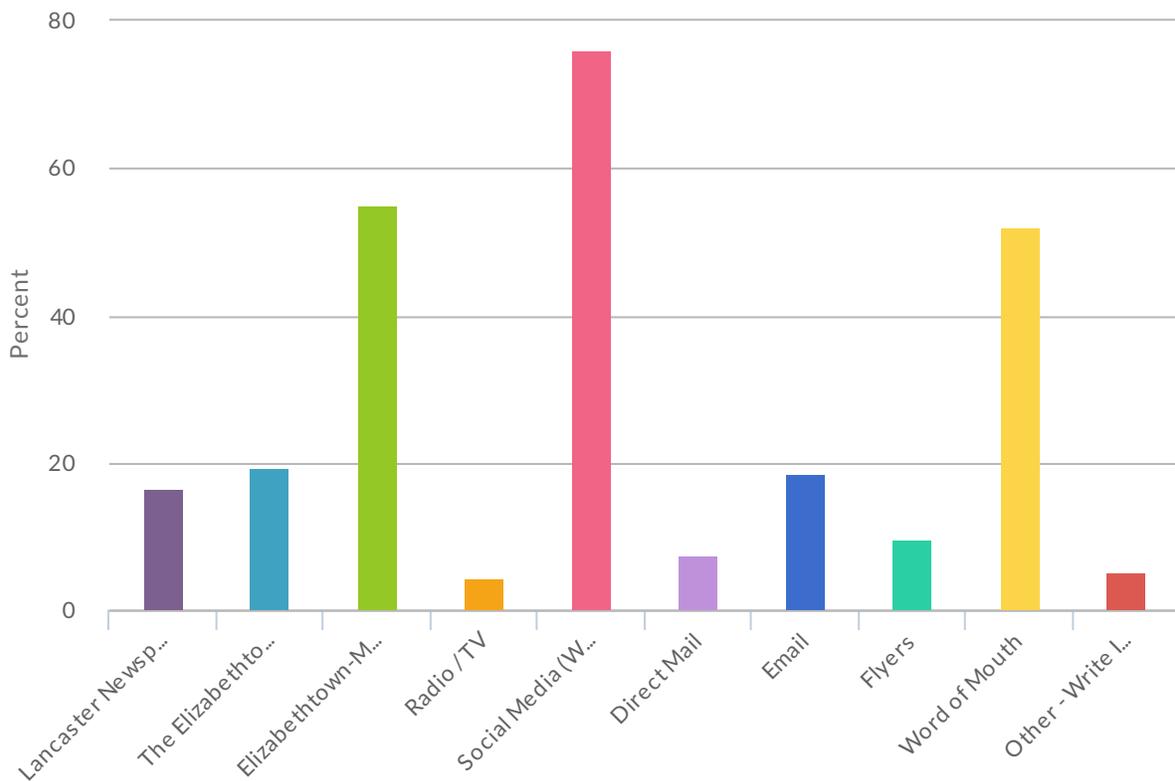


#### 4. OK! So, you currently live in Elizabethtown! Are you a...



Value	Percent	Count
Borough Resident	48.6%	89
Township Resident	40.4%	74
Masonic Village Resident	8.7%	16
Elizabethtown College Student	2.2%	4
<b>Total</b>		<b>183</b>

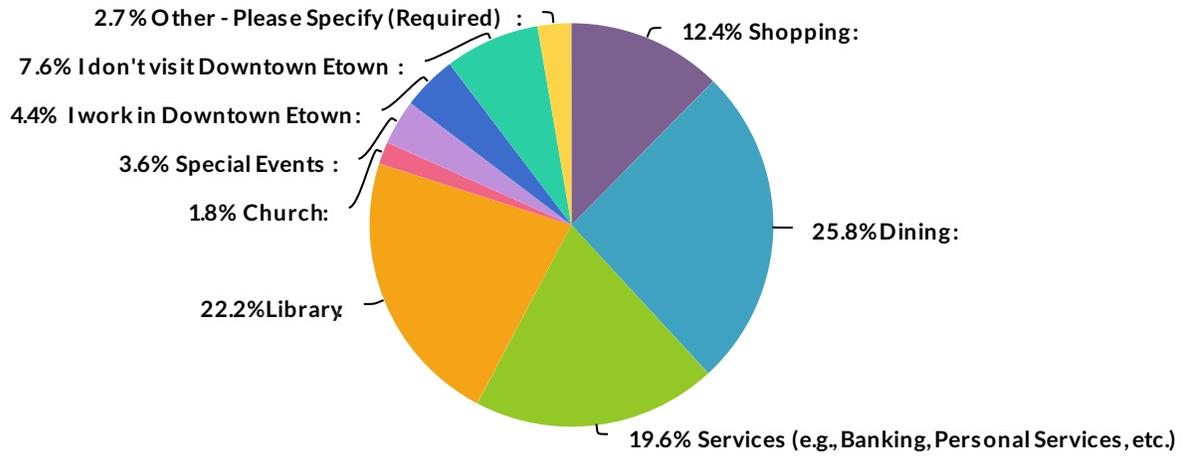
## 5. How do you get information on businesses, events, and/or activities in Downtown Elizabethtown?



Value	Percent	Count
Lancaster Newspaper	16.7%	38
The Elizabethtown Advocate	19.4%	44
Elizabethtown-Mount Joy Merchandiser	55.1%	125
Radio / TV	4.4%	10
Social Media (Websites, Facebook, etc.)	76.2%	173
Direct Mail	7.5%	17
Email	18.5%	42
Flyers	9.7%	22
Word of Mouth	52.0%	118
Other - Write In	5.3%	12

Other - Write In	Count
Elizabethtown Facebook Page	1
Facebook	1
Fishwrapper	1
MSIB	1
Macaroni kid newsletter	1
PennLive.com	1
asking the people who are "in the know."	1
chamber newsletter	1
don't	1
google	1
just by driving thru	1
while visiting businesses	1
Total	12

## 6. What is the PRIMARY reason you visit Downtown Elizabethtown?



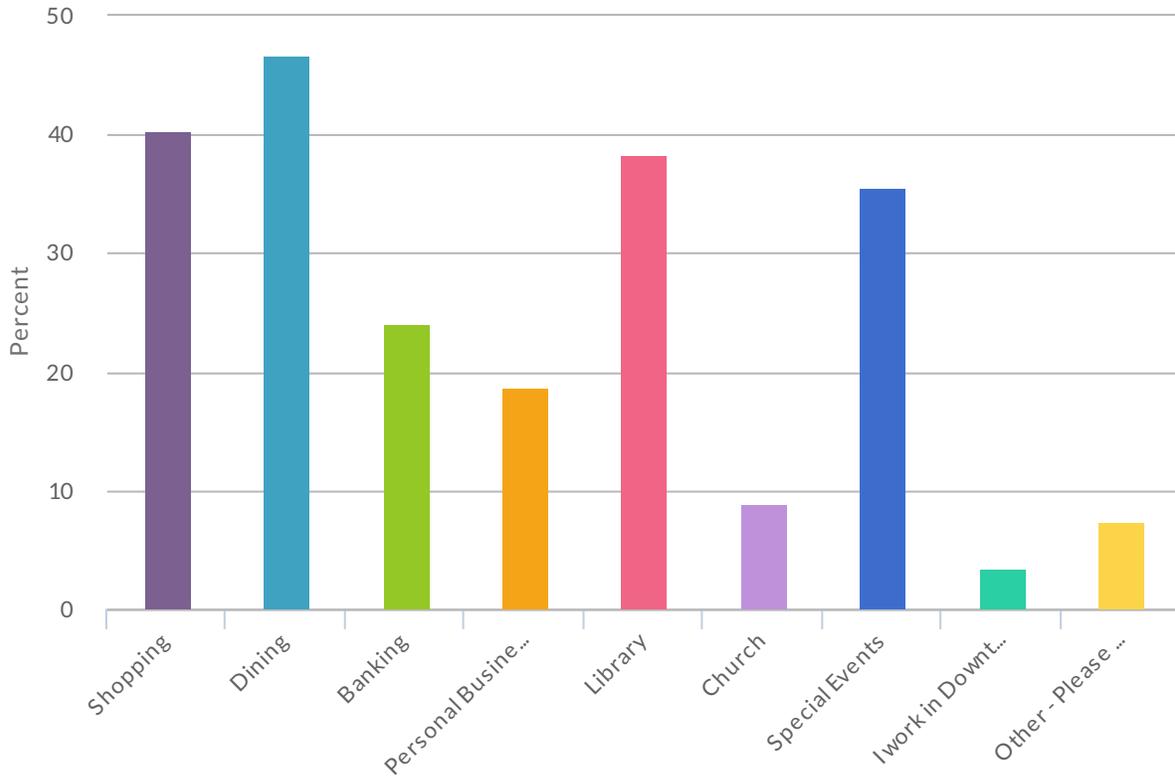
Value	Percent	Count
Shopping	12.4%	28
Dining	25.8%	58
Services (e.g., Banking, Personal Services, etc.)	19.6%	44
Library	22.2%	50
Church	1.8%	4
Special Events	3.6%	8
I work in Downtown Etown	4.4%	10
I don't visit Downtown Etown	7.6%	17
Other - Please Specify (Required)	2.7%	6
<b>Total</b>		<b>225</b>

Other - Please Specify (Required)	Count
I rarely visit downtown Etown - have no reason or need to go there.	1
I usually walk the downtown to just look around. I generally sit and have coffee at Folklore and ruminate how to involve myself in the community and be a catalyst towards change	1
my office is there	1
support of local business	1
visiting with friends at Folklore	1
work -- when I have business meetings with someone there	1
Total	6

## 7. Please share with us why you don't visit Downtown Elizabethtown!

Count	Response
1	I don't have a need to visit it.
1	Lack of parking
1	Little to offer
1	Not much variety or parking
1	Nothing there anymore, Shop owners are charged too much for rent on shop buildings and no one shops so they end up shutting down, Greedy landlords
1	Parking
1	There's no parking and the businesses don't meet our needs. There's no reason to go into town.
1	We only have pizza shops and beauticians. We need more restaurants like Applebys, etc. Compare how many businesses and food restaurants we have compared to Mount Joy. They even have a Sonic, which does good business. Main Street is bad....needs work. When I go from one end of E-town to the other end I go the back streets and to avoid all the red lights. South Market at end of town at cemetery is in bad condition. We need a shopping center that has several stores.....not much parking down town. Look at the end of Mount Joy the stores they have.

## 8. What OTHER activities do you do in Downtown Elizabethtown?



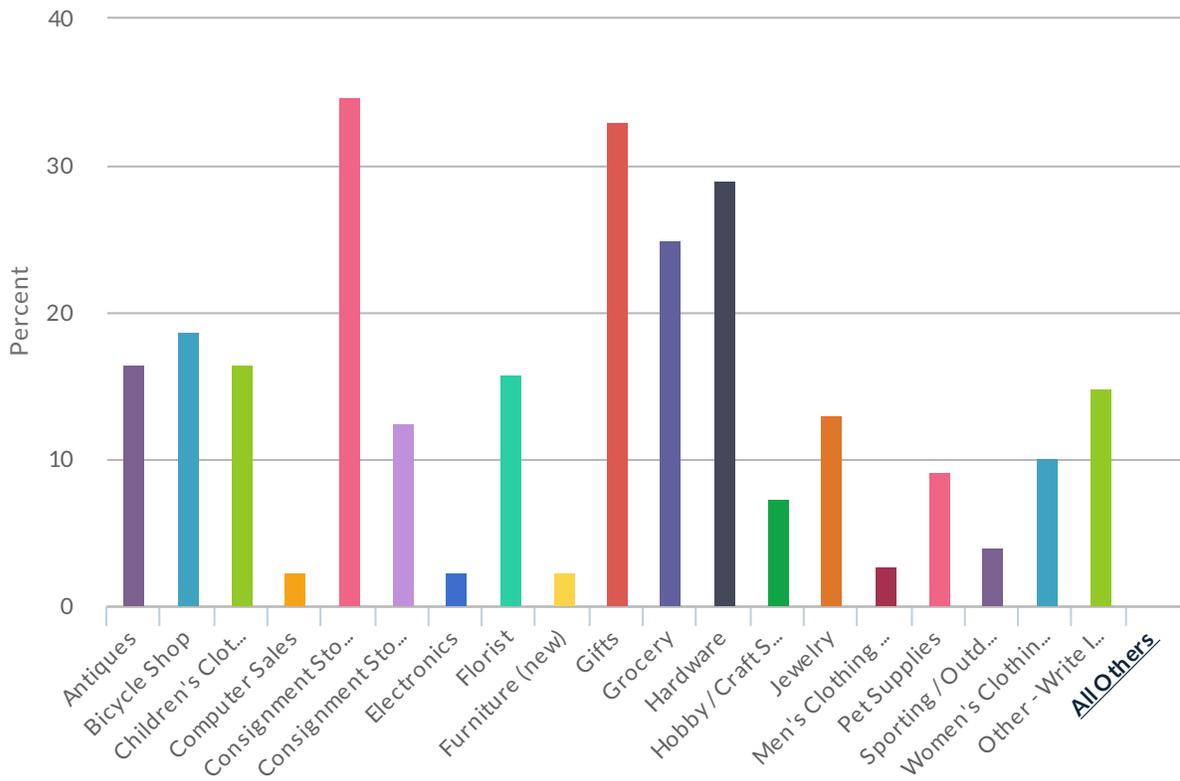
Value	Percent	Count
Shopping	40.4%	82
Dining	46.8%	95
Banking	24.1%	49
Personal Business	18.7%	38
Library	38.4%	78
Church	8.9%	18
Special Events	35.5%	72
I work in Downtown Etown	3.4%	7
Other - Please Specify (Required)	7.4%	15

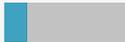
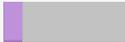
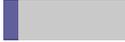
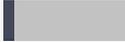
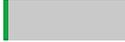
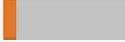
Other - Please Specify (Required)	Count
Drink coffee at Folklore, attend meetings there too.	1
Funk's pub & Lucky Duck	1
GEARS	1
Hair cut	1
Help at Community Cupboard	1
I don't really go downtown. No interest in the businesses that are there	1
I don't unless I have to	1
I regularly walk the downtown for exercise	1
No reason to go into the downtown. It's beyond dismal	1
Own rentals downtown	1
Post Office	1
Post office	1
Walks	1
go to groffs	1
walking	1
Total	15

## 9. How would you rate Downtown Elizabethtown in the following areas?

	Excellent	Above Average	Fair	Below Average	Poor	N/A
Variety of Shopping	1 0.5%	16 7.3%	115 52.8%	54 24.8%	30 13.8%	2 0.9%
Variety of Dining	6 2.8%	42 19.4%	115 53.0%	37 17.1%	17 7.8%	0 0.0%
Variety of Services	1 0.5%	51 23.5%	122 56.2%	27 12.4%	14 6.5%	2 0.9%
Hours Businesses are Open	3 1.4%	33 15.4%	113 52.8%	42 19.6%	18 8.4%	5 2.3%
Parking Convenience	2 0.9%	36 16.7%	78 36.1%	43 19.9%	55 25.5%	2 0.9%
Overall Downtown Aesthetic / Cleanliness	25 11.6%	94 43.5%	82 38.0%	11 5.1%	4 1.9%	0 0.0%
Special Events	9 4.2%	68 31.8%	100 46.7%	22 10.3%	8 3.7%	7 3.3%

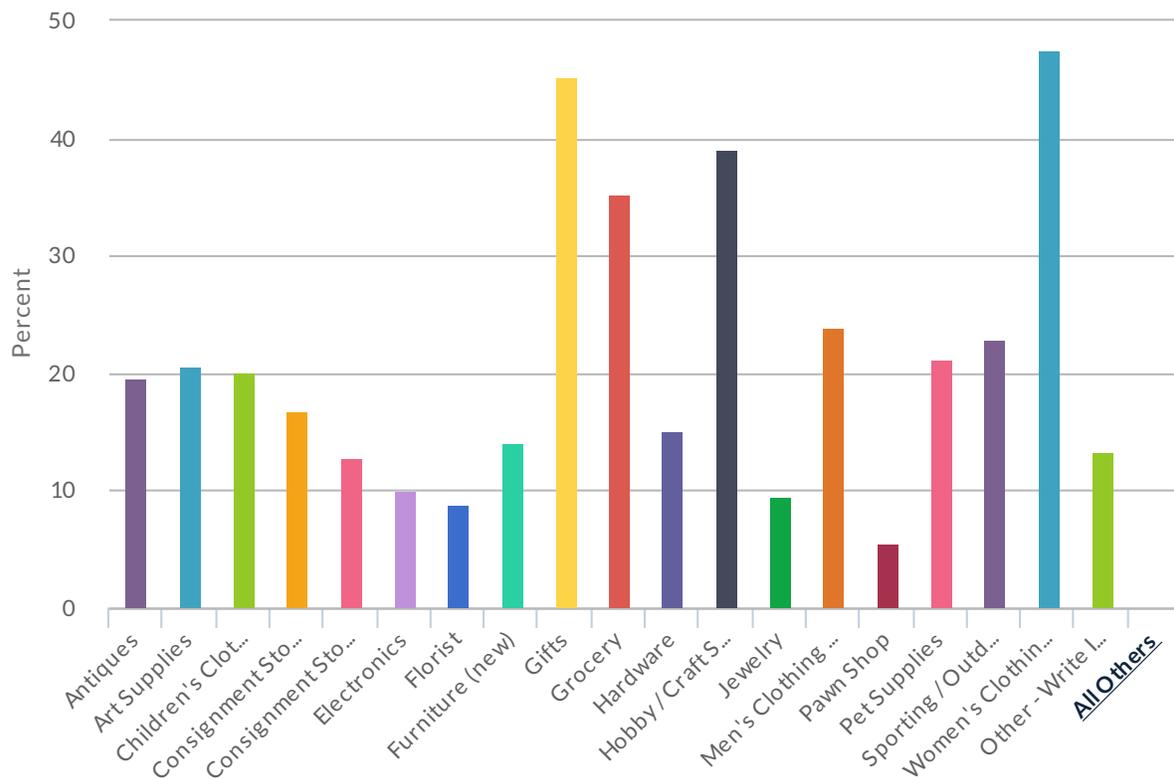
## 10. What type of Shopping do you currently patronize in Downtown Elizabethtown?



Value	Percent		Count
Antiques	16.5%		29
Bicycle Shop	18.8%		33
Children's Clothing/Accessories	16.5%		29
Consignment Store (Clothing)	34.7%		61
Consignment Store (Furnishings)	12.5%		22
Florist	15.9%		28
Gifts	33.0%		58
Grocery	25.0%		44
Hardware	29.0%		51
Hobby / Craft Shop	7.4%		13
Jewelry	13.1%		23
Pet Supplies	9.1%		16
Sporting / Outdoor Goods	4.0%		7
Women's Clothing / Accessories	10.2%		18
Other - Write In	14.8%		26
<a href="#">All Others (click to expand) ▾</a>	13.7%		24

Other - Write In	Count
Appliances	2
BB&T, Groff Meats, Lucky Ducks, B&G Lumber	1
Barbershop	1
Beautician & Pizza	1
Bridal emporium	1
Coffee at Folklore	1
Comic Shop	1
Dining	1
Don't really go downtown	1
Don't shop there	1
Good Burrito & Pita Pit	1
Groff Meats	1
Groffs	1
Meay	1
Natural Creations hair salon	1
None except the rare trip to the post office	1
insurance	1
on line	1
pizza	1
shoppes on mkt	1
thrift	1
Total	22

# 11. What type of Shopping would you patronize if it (and/or more options) were available in Downtown Elizabethtown?



Value	Percent		Count
Antiques	19.6%		35
Art Supplies	20.7%		37
Bicycle Shop	4.5%		8
Children's Clothing/Accessories	20.1%		36
Computer Sales	3.9%		7
Consignment Store (Clothing)	16.8%		30
Consignment Store (Furnishings)	12.8%		23
Electronics	10.1%		18
Florist	8.9%		16
Furniture (new)	14.0%		25
Gifts	45.3%		81
Grocery	35.2%		63
Hardware	15.1%		27
Hobby / Craft Shop	39.1%		70
Jewelry	9.5%		17
Men's Clothing / Accessories	24.0%		43
Pawn Shop	5.6%		10
Pet Supplies	21.2%		38
Sporting / Outdoor Goods	22.9%		41
Women's Clothing / Accessories	47.5%		85
Other - Write In	13.4%		24
<a href="#">All Others (click to expand) ▾</a>	1.7%		3

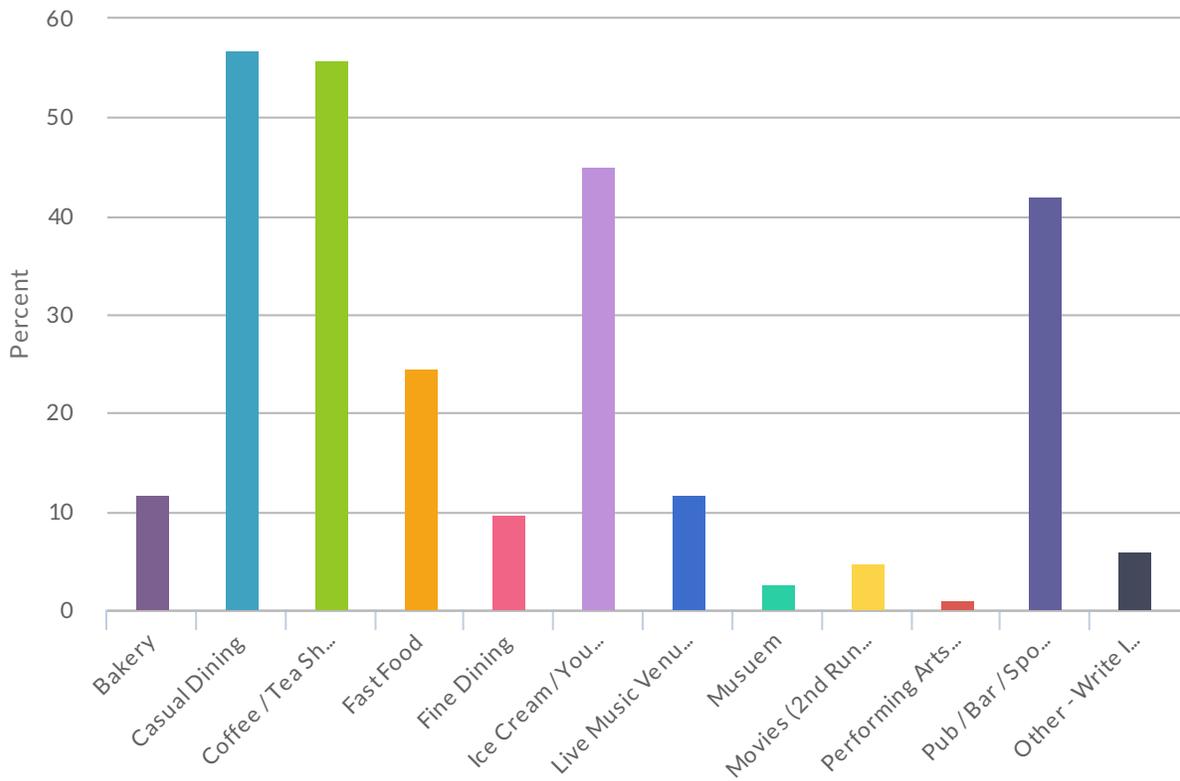
Other - Write In	Count
Restaurant	2
By gifts I mean more speciality shops that attract out-of-town "lunchers & browsers"	1
Etown needs an upper class establishment such as starbucks the	1
Parking is such a pain, that I can't see myself doing any of these	1
Sheetz, Dollar Tree	1
Specialty	1
Specialty Store	1
Specialty food	1
Sports and outdoor gear	1
Tattoo parlor	1
Toy store	1
a good bakery	1
natural foods	1
record store	1
restaurants	1
specialty kitchen	1
Total	17

## 12. What type of Shopping would you patronize if it (and/or more options) were available in Downtown Elizabethtown?

Count	Response
1	A town farmer's markets with local farms. To support local farms!
1	An actual craft/hobby shop, that hosted painting nights, classes, kids activities would be wonderful here in Etown.
1	An olive oil store, a specialty seasons store, an active wear store, a bread store
1	Bookshops More original shops Winery
1	Etown needs an upper class establishment such as starbucks, wholefoods, chipotle, cheesecake factory, etc. to target educated customers.
1	Etown needs an upper class establishment such as starbucks, wholefoods, chipotle, cheesecake factory, pf chang target, etc. (A high class chain) In order to target educated customers.
1	I don't really think about going downtown to shop for merchandise.
1	I would like to see more 'ethnic' type restaurants downtown that would serve Thai, Indian, Peruvian food other than boring pizza (too many pizza joints in and around Etown).
1	It is difficult to patronize the downtown due to poor parking, parking meters and lack of variety. I don't want to park to visit only one shop. I would rather go where I go do all of my shopping at once. Downtown could be awesome. We need planning and more upscale business. Too many second hand shops with too much junk.
1	Love to see a candy store back in etown
1	More "new" items available instead of used items for purchase. More stores like lititz's downtown.
1	Restaurants
1	Specialty foods eg Rooster Street Provisions, art galleries, quality gift shops
1	Store when I need to buy anything....K-Mart.
1	There are already some of these establishments, however they are not of good quality (the 'antiques/consignment' place on Market St.
1	We need a place to purchase craft stuff, for all the school projects my kids need to do for school and various activities.
1	We need more upscale shopping and less thrift shops.
1	grocery is highly dependent upon cost OR quality. farmers market, i'm in. darrenkamp prices but downtown i'm in. corner store not going.



### 13. What type of Dining / Entertainment do you currently patronize in Downtown Elizabethtown?



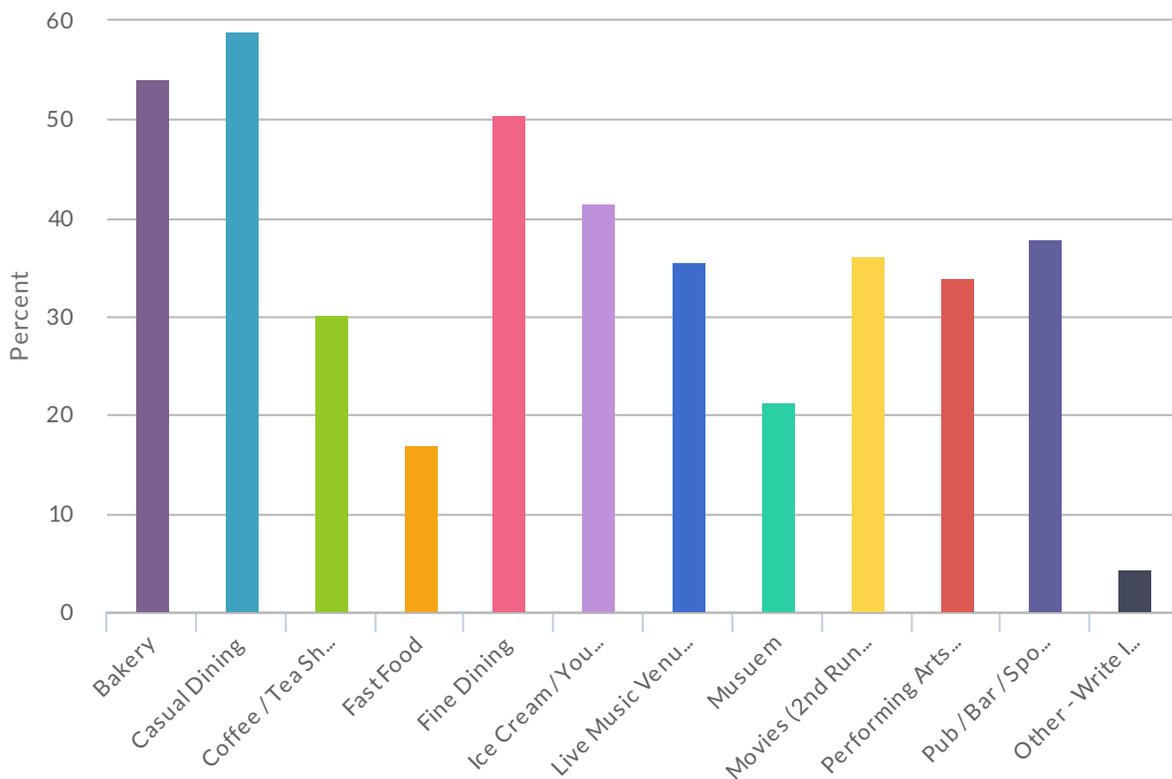
Value	Percent		Count
Bakery	11.8%		22
Casual Dining	57.0%		106
Coffee / Tea Shop	55.9%		104
Fast Food	24.7%		46
Fine Dining	9.7%		18
Ice Cream / Yougart	45.2%		84
Live Music Venue	11.8%		22
Musuem	2.7%		5
Movies (2nd Run / Discount)	4.8%		9
Performing Arts Theater	1.1%		2
Pub / Bar / Sportsbar	41.9%		78
Other - Write In	5.9%		11

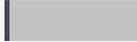
Other - Write In	Count
None	2
pizza	2
Chinese, Burritos	1
Ethnic (Chinese)	1
Lucky Ducks	1
Pozza	1
travel agency	1
<b>Total</b>	<b>9</b>

## 14. What type of Dining / Entertainment do you currently patronize in Downtown Elizabethtown?

Count	Response
2	None
1	Bakery is now closed- I did patronize the Center Square Bakery when it was in business. Parking is an issue. Would love to see a successful ice cream or frozen yogurt venue downtown.
1	Funk's, Good Burrito, and Folklore are excellent.
1	Good burrito
1	We prefer restaurants rather than fast food.....fast food is not healthy. Seafood Restaurant, Steak Restaurant, Applebys, Olive Restaurant would be great.

### 15. What type of Dining / Entertainment would you patronize if it (and/or more options) were available in Downtown Elizabethtown?



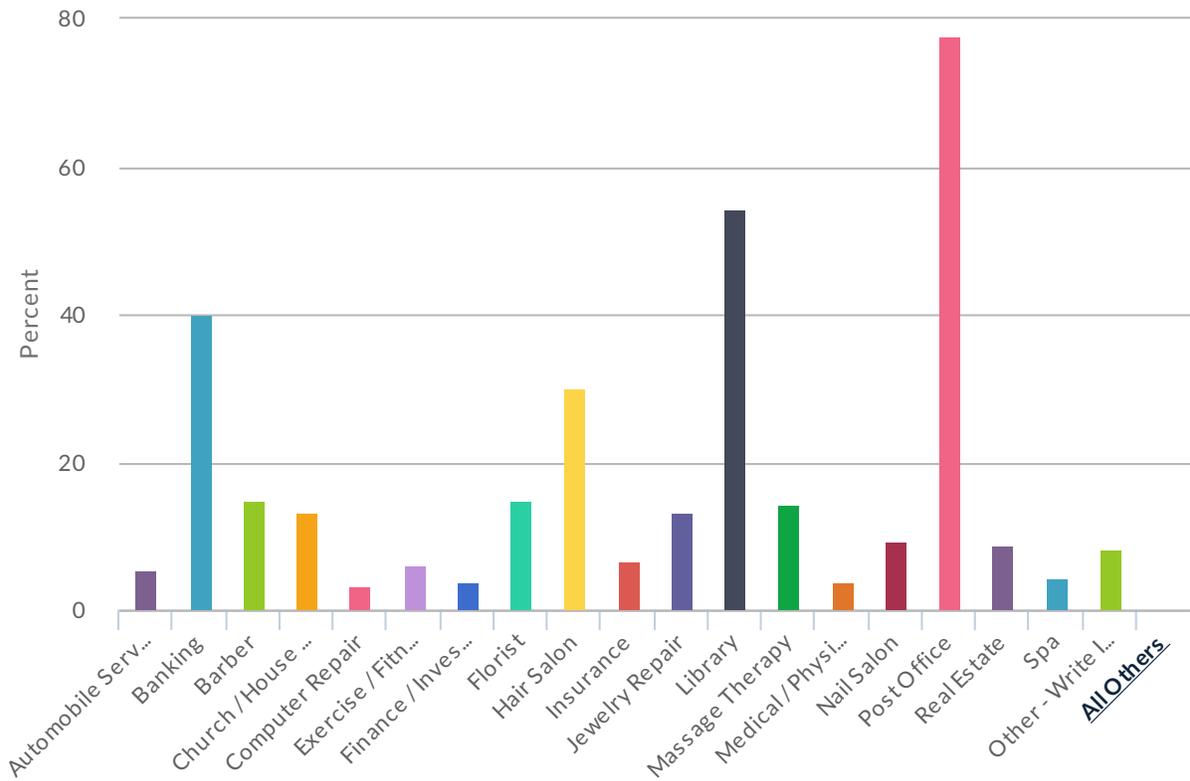
Value	Percent		Count
Bakery	54.3%		102
Casual Dining	59.0%		111
Coffee / Tea Shop	30.3%		57
Fast Food	17.0%		32
Fine Dining	50.5%		95
Ice Cream / Yougart	41.5%		78
Live Music Venue	35.6%		67
Museum	21.3%		40
Movies (2nd Run / Discount)	36.2%		68
Performing Arts Theater	34.0%		64
Pub / Bar / Sportsbar	37.8%		71
Other - Write In	4.3%		8

Other - Write In	Count
A nice, clean gym with working equipment	1
Gluten free options	1
Tattoo parlor	1
<b>Total</b>	<b>3</b>

## 16. What type of Dining / Entertainment would you patronize if it (and/or more options) were available in Downtown Elizabethtown?

Count	Response
1	Bagel place/coffee place
1	Buffets
1	By bakery, I mean a real on, with more than just muffins. Cakes, breads, pastries, bagels, cookies, cupcakes. with reasonable hours!
1	I would LOVE to have a Sweet Frog frozen yogurt place
1	I'd consider Fine Dining or the coffee shop if there were more places to park, even if I need to walk a block or two.
1	If these were quality businesses with adequate parking. Seems many buildings are owned by the same person/people? And rent is high, making it a challenge for new business owners to invest downtown.
1	Must have parking available though
1	Our family was sad when the gluten free bakery moved to Mt. Joy. We'd also love to see some of the local pubs/restaurants carry hard cider as a gluten free option for patrons.
1	PLEASE...NO MORE PIZZA JOINTS IN TOWN
1	Winery
1	Would like to see more dining options
1	i miss the bakery a couple of iterations ago quite a bit! now, there is nothing... that's okay if i could get myself a cupcake some place! there was a brief period that i could at least get a slice of cake at flowers in the kitchen but they retired. i wish someone would wholesale some cupcakes to folklore. also, i still shake my head about the jj jeffries deal falling threw (thought that was to be out by masonic not downtown)

# 17. What type of Services do you currently patronize in Downtown Elizabethtown?



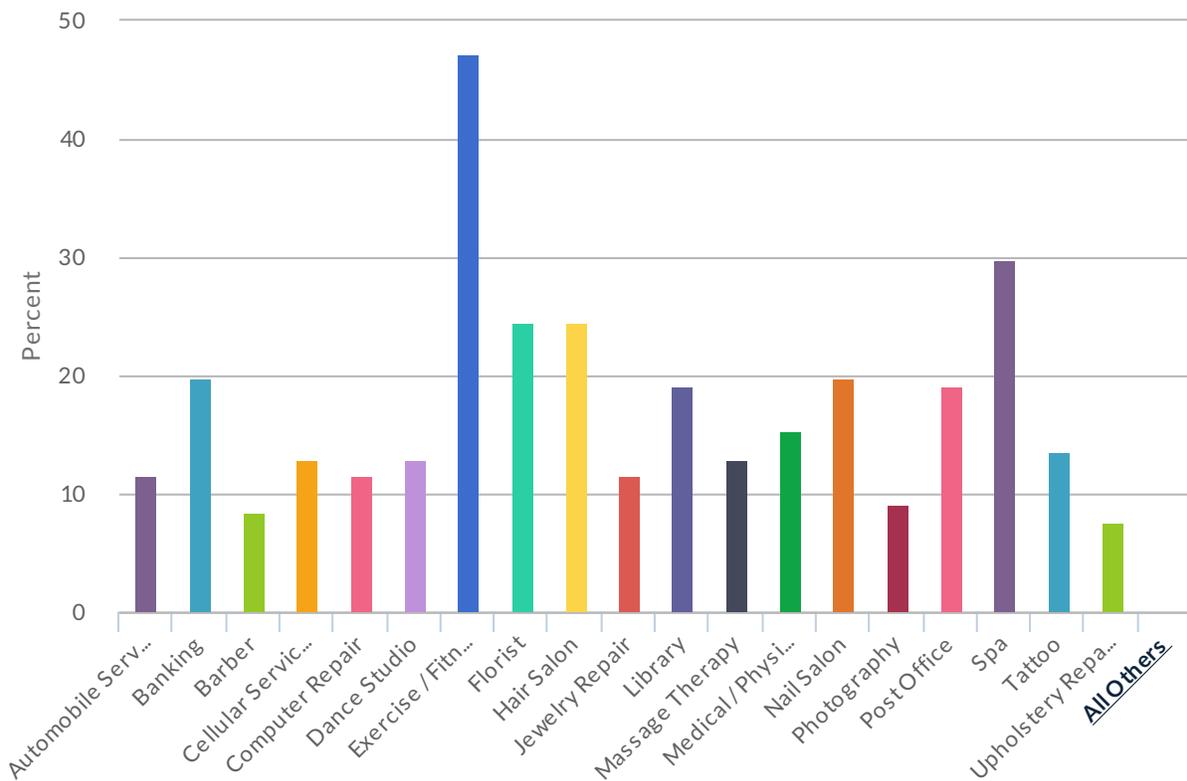
Value	Percent		Count
Automobile Services	5.6%		10
Banking	40.0%		72
Barber	15.0%		27
Church / House of Worship	13.3%		24
Computer Repair	3.3%		6
Exercise / Fitness / Yoga	6.1%		11
Finance / Investment Services	3.9%		7
Florist	15.0%		27
Hair Salon	30.0%		54
Insurance	6.7%		12
Jewelry Repair	13.3%		24
Library	54.4%		98
Massage Therapy	14.4%		26
Medical / Physical Therapy	3.9%		7
Nail Salon	9.4%		17
Post Office	77.8%		140
Real Estate	8.9%		16
Spa	4.4%		8
Other - Write In	8.3%		15
<a href="#">All Others (click to expand) ▶</a>	8.4%		15

<b>Other - Write In</b>	<b>Count</b>
Karate	2
Dining	1
Dry cleaning	1
Folklore only	1
Furniture repair	1
Hardware	1
Heating and cooling	1
Legal	1
Legal services	1
None	1
Notary	1
Shopping	1
dentist	1
Total	14

## 18. What type of Services do you currently patronize in Downtown Elizabethtown?

Count	Response
1	Again Elizabethtown Area
1	Attorney
1	B and g
1	Comic Shop , coffee shop
1	Dry cleaners Notary Post Office
1	Hardware
1	i have been meaning to look into co working at black bear center

## 19. What type of Services would you patronize if it (and/or more options) were available in Downtown Elizabethtown?



Value	Percent	Count
Automobile Services	11.5%	15
Banking	19.8%	26
Barber	8.4%	11
Cellular Service	13.0%	17
Church / House of Worship	5.3%	7
Computer Repair	11.5%	15
Coworking / Shared Office Space	6.9%	9
Dance Studio	13.0%	17
Exercise / Fitness / Yoga	47.3%	62
Finance / Investment Services	4.6%	6
Florist	24.4%	32

Value	Percent		Count
Hair Salon	24.4%		32
Insurance	5.3%		7
Jewelry Repair	11.5%		15
Library	19.1%		25
Massage Therapy	13.0%		17
Medical / Physical Therapy	15.3%		20
Nail Salon	19.8%		26
Photography	9.2%		12
Post Office	19.1%		25
Real Estate	3.1%		4
Spa	29.8%		39
Tanning	3.8%		5
Tattoo	13.7%		18
Upholstery Repair	7.6%		10
Other - Write In	7.6%		10

Other - Write In	Count
Bookstore	1
Craftstudio	1
Different creative shops	1
Hardware and CVS	1
Legal services	1
Meal preparation business-pick up gourmet	1
None; as needed	1
PNC	1
PNC, AAA	1
Specialty shops	1
Total	10

## 20. What type of Services would you patronize if it (and/or more options) were available in Downtown Elizabethtown?

Count	Response
1	Again if there was more parking available
1	Craft store
1	I would patronize downtown more if there was good parking and variety and less junkiness.
1	Pretzel shop, bakery, gift stores, kitchen accessory stores (like Lititz), chocolate shop (like Lititz, breakfast /bagel shop, toy store (new toys, not used) make it more like Lititz and more so something families will move in and property value will go up
1	Specialty food stores
1	banking - pnc only i think we need to be really careful about this segment of the economy... i'll certainly take having a CPA downtown than the building go vacant, but especially low visit frequency service professionals should really be out at masonic or one of the buildings that jewel david ministries owns, etc. while i don't know how we sustain so many hairdressers, i haven't been to one in 10 years, i'm fine with them being downtown as people use it frequently and it gets people downtown. same with the post office, massage, etc. it's the once in a blue moon service professionals that are really better off elsewhere.

## 21. Please provide any other comments or input you have for improving Downtown Elizabethtown. We are interested in what you have to say!

Count	Response
1	more specialty shops like Lititz has
1	Advertise parking areas. Get better restaurants like Mount Joy and Lititz.
1	Alot of the buildings should be made to update outsides to make them look more presentable! ( Like in Litiz). Make it look like we care about our town and make an effort to keep it nice. I can't say I'm proud of the town we live in. We need different food other then pizza shops! We don't need so many hair salons and nail places. I think a farmers market we be a neat thing to bring the community together and entertainment. Thank you for doing this survey!!
1	Because so many businesses have apartments and renters there are not enough parking spots for tenants and downtown customers and employees. Every look at putting a mini parking garage in? Perfect spot for it would be behind lot where you currently have a parking lot. Perhaps buy a few nearby buildings too. There would be plenty of money made from it to eventual recoup original costs. Charge daily fees, hourly fees and offer monthly & yearly fees for downtown renters and business employees. Perhaps look into government assistance in cost of everything.
1	Cooperation between the Chamber and MSIB. STOP the infighting between 2 groups that should be working together to accomplish success in the downtown
1	Demolish a building and create parking.
1	Downtown Elizabethtown has potential - it just needs some TLC, a few more fun retail and dining/entertainment venues... and to get the word out. good luck!
1	Downtown has the potential to appeal to a number of demographics in this area: Masonic Village residents, visitors, and employees, Etown College students, visitors, employees, people who drive to Etown for work, and of course Etown area residents. Etown needs to offer a variety of unique stores that appeal to each group. Plus, we need more restaurants! My friends and neighbors drive out of town to eat. Examples of places we like: the Batdorf, the Bluebird, Tomato Pie Cafe, Himalayan Grille, Lazzaros, Bangkok 56. We have money to spend, just offer us places to do it in. Here's what I don't need: another pizza place, another Chinese restaurant, another consignment store, another bank.
1	E-Town is a great, small community. I was raised here and I'm 78. K-Mart is the only store that has a variety of items. If they don't have what you want you must go out of town. Count the number of beauticians and the number of pizza shops. We don't need anymore fast food....not healthy.
1	Elizabethtown is a college town and the store owners should take advantage of that. Students are willing to go downtown, but there really is not much things that are targeted for college students.

Count	Response
1	Elizabethtown needs stricter laws on building new buildings in downtown. The Advance Auto should not have been allowed to build a cookie cutter cinder block building away from the sidewalk with a parking lot in front. They should have been forced to build at the sidewalk with a parking lot in back like the rest of the downtown. AND they should have been forced to build a building in keeping with the historical look of the downtown. Also, Elizabethtown needs require the building of sidewalks along all E-Town roads. Example, there are homes near the College Lake and continuing to Bear Creek Intermediate School that do not have sidewalks. These homes should be required to put in sidewalks, to create a more walkable town. Also, all new businesses should be required to build buildings that are historical or aesthetically beautiful in look. Example Rita's building shouldn't be allowed to look like a trailer--our town is after all not a trailer park.
1	Etown looks like a ghost town with all of the empty store fronts. No more pizza shops or consignment shops. Speak to Mt Joy C of C. They seem to be doing something right. Our Memorial Day parade doesn't even get the town people out. Come on Etown...get it together!
1	Existing businesses should pay more attention/spruce up storefronts. I would love to see more specialty or upscale shopping options, too many junky consignment style businesses already.
1	Extended hours at the Library would be great.
1	Free parking
1	From an image standpoint, there are too many consignment shops and salons in prime locations. I can't speak to the success they are or are not having, but I feel other services/business would be better suited for some of the current locations.
1	Get rid of greedy building owners and let some new people take over
1	Get rid of parking meters or make it so you can put multiple coins for more time.
1	Get rid of the parking meters! We don't have change all the time!
1	I am concerned about drugs in the park. I do t feel like it is a safe place to bring my family.
1	I believe that E-Town should have more of a variety of restaurants.
1	I can usually find a parking space, however will choose not to go to certain establishments if it means I have to then walk across a cross walk at the Square to get to my destination. It's hard to gauge cars turning from all directions, esp with young kids. Would it be possible to have the 'Walk' button bring a red light to all four directions? It would make a difference in the number of shops I'd patronize during a visit downtown. I don't mind walking a ways from my parking spot, but I do mind getting injured.
1	I love the downtown feel of Elizabethtown. Unfortunately the traffic lights keep multiplying! The traffic is horrific on some days just trying to get from one side of town to the other. I would like to also see more of a partnership with the college. It would be nice to be able to attend some of their events. Etown college sports, theatre, music, etc. is a great thing to share with the community.
1	I love to support businesses in Elizabethtown. I wish parking was better for some shops. I have kids and don't like to park on the street. I think they need to have an ordinance on what shops can put in windows to make it look better. Stuff should not be allowed on streets for viewing. It may have been done because it seems to be better already.

Count	Response
1	I may be part of the minority, but I think parking is the biggest issue. There are very few places for people to park either downtown or near the Amtrak station. It can be very frustrating some days though I do understand it's difficult to create more parking.
1	I never leave Etown if I can help it. I prefer to keep myself and my money here in town. I'd love to see a store similar to Crafter Hours in Mt. Joy find its way to Etown. I'd also like to see a consignment shop of the same caliber as The Fancy Unicorn, but for adults, find its way to us.
1	I rarely go downtown with the exception of the library and that's not very often. I prefer to shop and dine where there's plenty of parking and less traffic congestion .
1	I think an overhaul of the outside of shops to help them not look archaic would be nicer. Preservation is important, but stores look inhospitable and stale.
1	I very rarely shop in town because of parking would be nice to have a parking garage.
1	I would LOVE to see an Arts and Crafts supply store in E-town! I'd also like another casual hangout coffee shop downtown.
1	I would to be involved in helping to redevelop the downtown. I know the community. I Have the ability to involve others to help a cause. The downtown is near and dear to many of us. I am willing to do the work if anyone will just listen to what I gave to say. Mill Aller 713-775-7216
1	I'd love to see the college get involved with second Fridays! Or more advertising for them in general
1	Improve the appearance... Rules on store windows and clutter. Fresh paint and better signs. There are too many second hand/junk stores. The town is getting a bad name for re-use it stuff. I wouldn't drive out of my way for this stuff. We need to look to towns like Litz, Davidson NC .... This is a sad college town which could be so much more...
1	Is there anyway houses along Market Street can seek help from other community members to fix up their properties, if people volunteer to help Out one another? Properties long Market street (or our Main Street) look run down and unappealing and a turn off to people visiting e-town and driving down our main road Side note:thank you for all the community events, family events, GEARS programs, and other events that are available here. They are priceless to families that live here and we have a sense of community thanks to those events Also, the Main Street is so very well taken care of and clean. Thank you for your hard work!
1	It can be very inconvenient when stores are closed early on Saturday and not open on Sunday. Not sure if it is because they don't do enough business Sunday or not but the weekend is my time to go explore the town and I am limited to Saturday or evenings.
1	It makes no sense whatsoever that business owners need to feed the meters or else get a ticket. Plenty of parking where I work but others get tickets. What would be so hard about giving them a 10 hour parking permit? Seriously. Show the business owners you actually care, it's long over due. MSIB seems to be the best forward thinkers. Don't discard them.
1	It would be nice if you could more like Litz. They have a lot of things always going on.

Count	Response
1	It's great that there is encouragement for new businesses to come to Etown- but without adequate parking, and not enough variety of quality businesses to draw people to stop in (ex. Store that offers books/cards/novelty items- not junk, plus another cafe similar to Folklore, a frozen yogurt or specialty chocolates shop, a specialy store like Rooster St which we lost- this combination give people a reason to stop downtown and stay for a bit. Etown has some of these but they are more spread out. )
1	Love the improvements.
1	Make parking available that is convenient for going into a business also traffic getting into town is difficult at times
1	Many people complain there isn't enough parking. This is just a rumor. I frequently visit and there is always plenty of parking. Sad we can't keep a bakery in town. A pastry & tea shop would be great.
1	Market Streets is not very inviting to look at... Could use flowers, clean windows in shops. Less consignments/thrift shops
1	Mens & womens clothing of all types. No parking meters. Transportation , especially from train station. Vendor at train station. Incentive for property owners in downtown, to renovate and upgrade 2nd and 3rd floor apartments.
1	More clothing places for females!
1	More evening hours. Would like to know more about the businesses- better advertising of what's available. Use of Facebook or other type of social media to feature businesses
1	More outdoor dinning options
1	More variety of businesses is necessary (to many hair & nail salons). To many businesses are closed in the evenings, when residents are home from work. A big investment needs to me made to improve the facades & visual appeal of the downtown.
1	More walking and biking More outdoor public space Outdoor dining
1	Move arts in the park back to downtown Police need to be monitoring the park for drugs - we can't take little kids without seeing it
1	My favorite little downtown would be Lititz!
1	My issue with spending more time downtown is the traffic. I enjoyed Lunch on the Square but the large trucks and exhaust fumes were overbearing! Same with sitting at Rita's or the deck at Lucky Ducks. Too much traffic and noise to enjoy the experience
1	My wife and I would love an upscale pub to eat and have a drink. Funks has great beer but the food is so, so. No place in Etown has nailed the food. Need something for foodies! Folklore is probably our most frequented place and is great for kids too. Lititz has so many great places and I would love to see something even close to the Bull's Head Pub in Etown. Ps... no more Pizza shops.
1	Need a Starbucks and donut shop! Also some other department store than Kmart. They never have anything I need which requires a trip to Hburg or Lancaster. I rarely go downtown due to prices of items

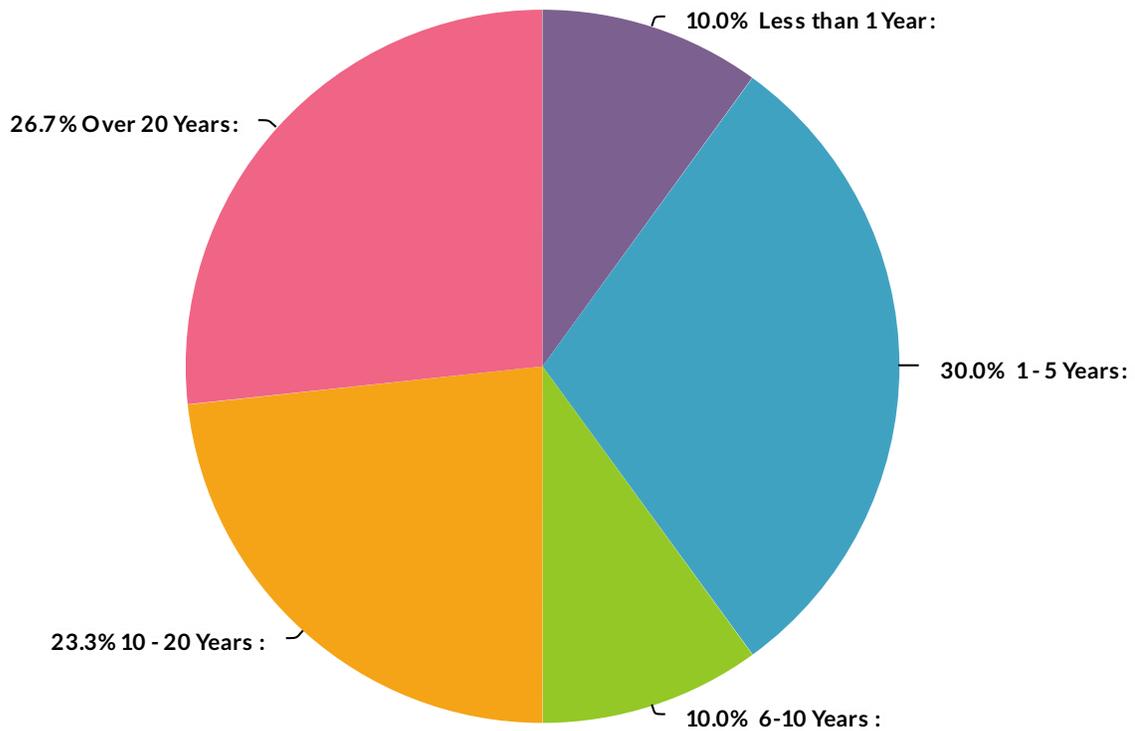
Count	Response
1	Need more off street parking. Turn the moose lodge into a parking garage. Offer grants/incentives for new specialty businesses to open in downtown. More community events to support the local downtown area (festivals, events, etc)
1	Needs a cleaner appearance, and better marked parking options. People always complain about the lack of parking, but I think its because they aren't aware of some of the options.
1	No more thrift stores. I am only interested in businesses that offer high quality services and merchandise. Funk Brewing is a great new business , and Good Burrito and Folklore seem to be doing well. Thanks for those businesses. Please study Lititz as it is a local destination spot and a thriving small town with a great atmosphere.
1	Noise ordinance enforced for very loud and abundant cars, trucks, cycles which tear thru the square and main and side streets at will and all hours.
1	Pa great shops, but parking makes it very difficult to customers to shop
1	Parking is a nightmare. Not sure what you can do but that's mainly why I don't frequent it.
1	Parking is always an issue, though I get why we cant do much about that. And why are places always closed off work hours? Seriously, OPEN UP ON SUNDAYS, and try being open hours after 6pm! We work, not gonna get there until after 6... And how about some better dining options? please? I hate driving so far away from home to eat a non fast food meal.
1	Parking is terrible. Council ignores the businesses owner's concerns. They just don't get it.
1	Parking is the biggest issue, I don't mind walking, but older people have a hard time
1	Parking is the biggest issue. Also, there may be businesses that I know of by name, but have no idea what they do or types of products they offer. So it's not so much a lack of advertising effort, but the type/quality of advertising.
1	Parking near the square, need much improvement
1	Parking, parking, parking!!! Please build a 4 story Parking garage where the Moose is today. Charge \$2 to park there to slowly recoup the cost over time. Without a significant parking increase the businesses will continue to fail. I would also require all businesses to adhere to a standard in terms of external appearance. The constant turnover in town has allowed some shops to have very poor appearances and signage.
1	Parking, parking, parking. Up-scale businesses, more food selection, less second hand shops. Bottom line...I would prefer to shop downtown and support local business but until there is parking, variety and more up-scale business, I will continue to go elsewhere. Downtown is not inviting or user-friendly.
1	Parking, there is never a sign of when to pay for street parking. I was told in weekend it was free but I never know. I would love more art and crafts places as we have none. I love how you decorate for holidays and love flowers. It is clean and safe to walk. The crosswalks at the nail salon and pita pit should have a better view of the person trying to walk as there is a parking spot there and people just walk out and you can't see them. It makes it hard
1	Please ignore all other survey responses where people complain about parking. There's not a problem, and there's certainly no need for a parking garage in Elizabethtown. I never have a problem finding a parking space, even if I have to walk a bit farther than I'd prefer.

Count	Response
1	Please include category for ages 55 - 64 on this survey
1	Shops that have things reasonably priced. Prices of some shops you can go to big brand stores and buy for much cheaper
1	Stop people from flying down n up Poplar St. To be racing to beat the light
1	Storefronts need to be clean...especially the Windows, sidewalks. Consider containers for cigarette butts. A coat of paint on those places where the paint is really peeling. Hanging baskets for each season. Businesses are hidden behind the brick monuments and Etown sign on the square!
1	Streets - paved
1	The downtown is an embarrassment.
1	The parking situation is very bad. The events downtown are not as appealing when I have to getting a ticket on a Saturday morning when normally the street parking is empty.
1	The sidewalks should be extended up through Giant. It's a short downtown because the sidewalks end.
1	The stores aren't relevant to the 20 year old or 30 year olds. The Main Street has so much potential!
1	There is no parking down town. Need parking garage!!!!
1	There needs to be a crack down by law enforcement in Elizabethtown on the heroine epidemic. The amount of drug abusers walking the streets openly is a huge turn off for people wishing to come explore and enjoy our town.
1	There needs to be better restaurants. There are too many fast food and pizza shops. There are I believe I counted right 9 pizza shops. We should have restaurants like Texas road house. Entertainment is horrible. There is no entertainment besides movie town. I have lived in Etown my entire life and I love it. It is a great town it just needs a few changes. Entertainment, restaurants and hotels I think are very important.
1	There needs to be some way to make the traffic flow better. If you want people to use the downtown area there should be better parking lots. If you drive in the alleys behind the stores most of the parking is private. People need to have alternatives to market street/turnpike road and Bainbridge street. I recently moved from Elizabethtown after working/driving there for 40 yrs. You have a bridge that goes nowhere in any crossings and a road that people can't use because the bridge is closed...it's been this way for many many years. The traffic lights need to be synchronized in order to make the traffic flow better and more time is needed to make a left turn so the traffic doesn't block the box. There's no point in bringing new business in to the downtown area if it is not user friendly. Maybe there could be some family friendly restaurants that aren't pizza and fast food and bars. What about a playhouse...something to do on Saturday or Sunday afternoon with going to the city...
1	They really need to get stuff together with when the college kids are back...those fireworks where where so inappropriate these kids need to learn when they come into our town then need to show us respect
1	This is a cute college town and it is not utilized as such. It is a shame that when you visit other towns described as this you have options. Etown is full of banks, churches, thrift shops and pizza places. We need fine dining and cute boutiques. The hours of operation are also important.

Count	Response
1	This response is NOT a criticism of downtown. But at my advanced age I have very little need of services/shopping other than what is offered at the all-inclusive Masonic Village.
1	To improve downtown the slum lords need spruce up the buildings and improve parking, improve traffic crossings
1	Way too many pizza shops, banks, and turkey hills. There needs to be a nice casual dining restaurant or chain.
1	We have to go to Stauffer/Kisser Hill for better groceries variety. Lancaster for almost everything. There are no shopping options in E-town. It would be great if we can have more options.
1	We need better parking!!!
1	We need more dining options!
1	We need more parking space for easier access to these downtown shops and special events that are being held.
1	We need parking that allows you to stop by quickly, like the parking we used to have right on the square. We also need a borough CVS type store and a hardware store.
1	Would love a fine dining restaurant
1	Would love to see a wider variety of restaurant options fill some of the empty storefronts. Also, it would be HUGE if the businesses would coordinate some of their hours. Can't tell you the number of times I've run into town on an errand and been off the opening or closing time by an hour. It's so hard to keep track of the businesses that open at 9, 10, 11, and 12 and then close at 2, 2:30, 3, 5, and 9. I realize it might be too much to ask- but I would end up patronizing many more places if they were open at the same times.
1	Cleanliness of store fronts & windows should be a priority. Welcoming & inviting seating, signage, and flowers.
1	I'm very happy that a lot of the downtown restaurants now have delivery... just a few months ago it was pizza or bust in terms of delivery. One of the biggest impediments to our downtown is noise pollution. I don't think I have ever lived in a place with so many motorcyclists with so few manners! Tractor trailer trucks are surprisingly respectful in residential and commercial neighborhoods downtown. Just try and buy a coffee from Folklore and sit outside for 30 minutes. Depending upon how beautiful the weather is, I still might go for it, but whew, it can sound like you're at the Indy 500. I've had a massage at Kairos disrupted pretty seriously due to traffic noise as well.

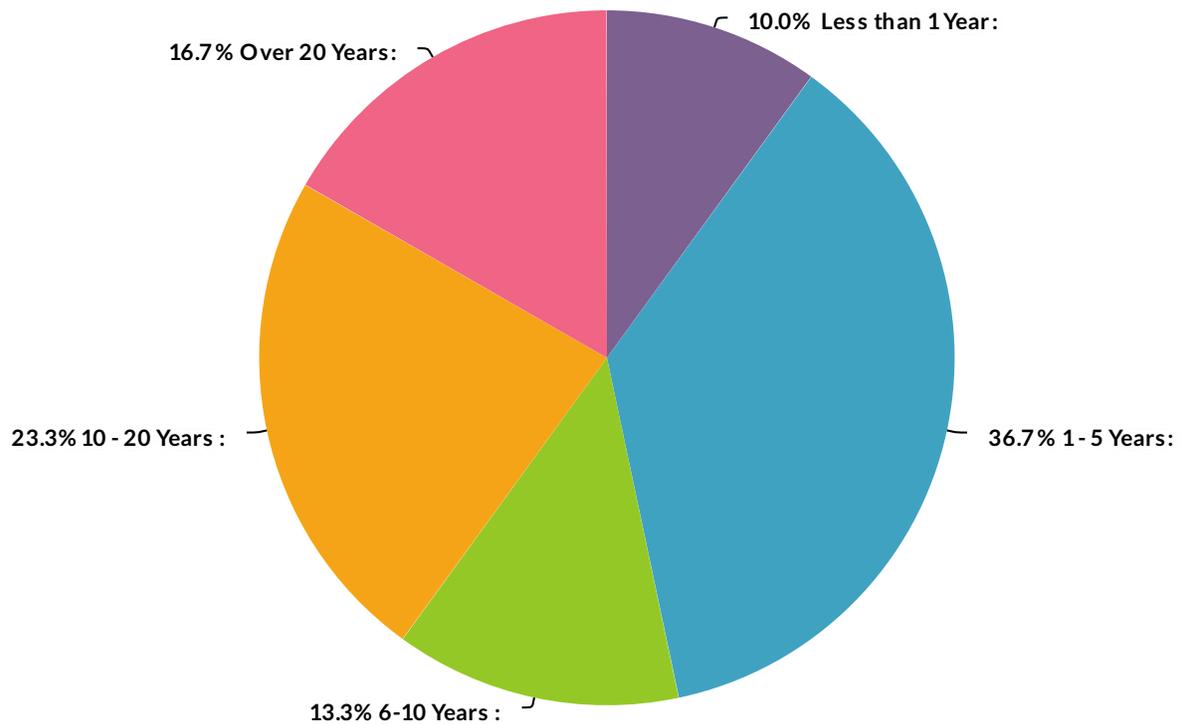
# Report for Dtnw Etnw Spring 2016 - Business Owner Survey 2016

## 1. How long have you been in business?



Value	Percent	Count
Less than 1 Year	10.0%	3
1-5 Years	30.0%	9
6-10 Years	10.0%	3
10-20 Years	23.3%	7
Over 20 Years	26.7%	8
<b>Total</b>		<b>30</b>

## 2. How long has your business been located in Downtown Elizabethtown?



Value	Percent	Count
Less than 1 Year	10.0%	3
1 - 5 Years	36.7%	11
6-10 Years	13.3%	4
10 - 20 Years	23.3%	7
Over 20 Years	16.7%	5
<b>Total</b>		<b>30</b>

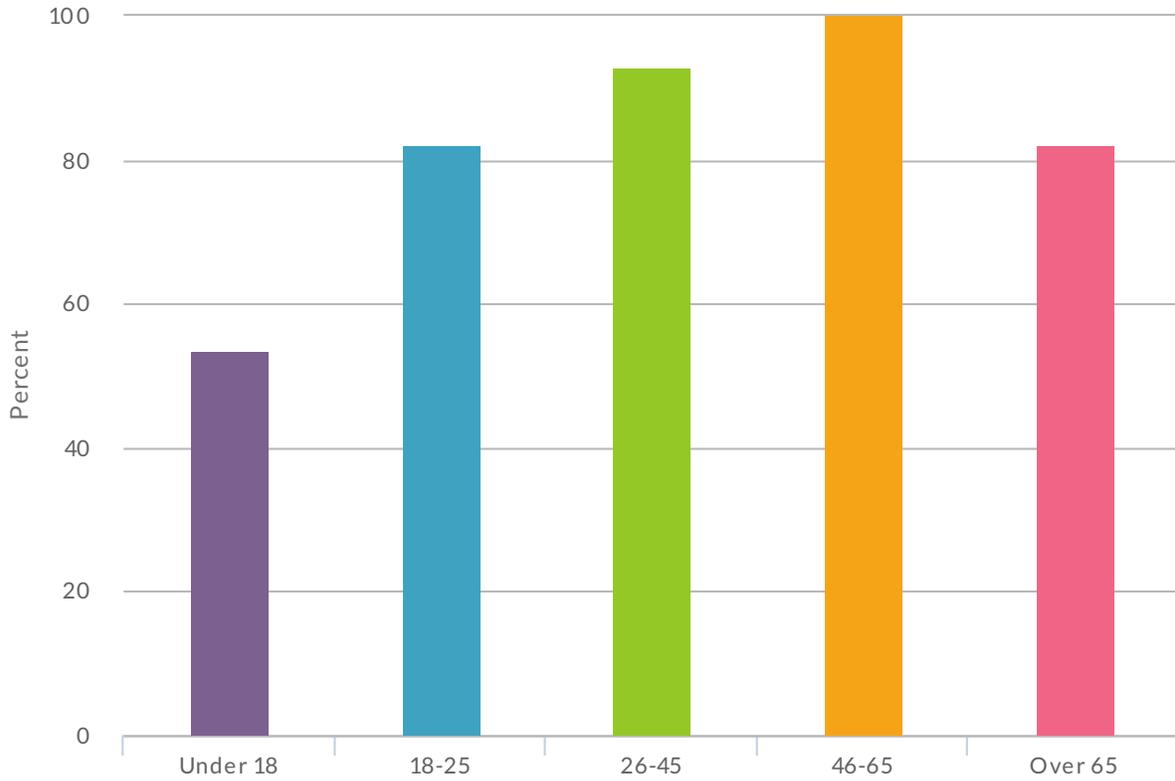
3. How many people, including owners, does your business employ in each of the following categories? (Full-time = 32 or more hours/week)

Item	Average	Min	Max	StdDev	Sum	Total Responses
Full Time Year Round	4.5	0	14	3.6	122.0	27
Part Time Year Round	4.4	0	18	4.9	106.0	24
Seasonal	2.9	0	10	3.1	29.0	10

#### 4. To what degree are you capturing the following customers / markets?

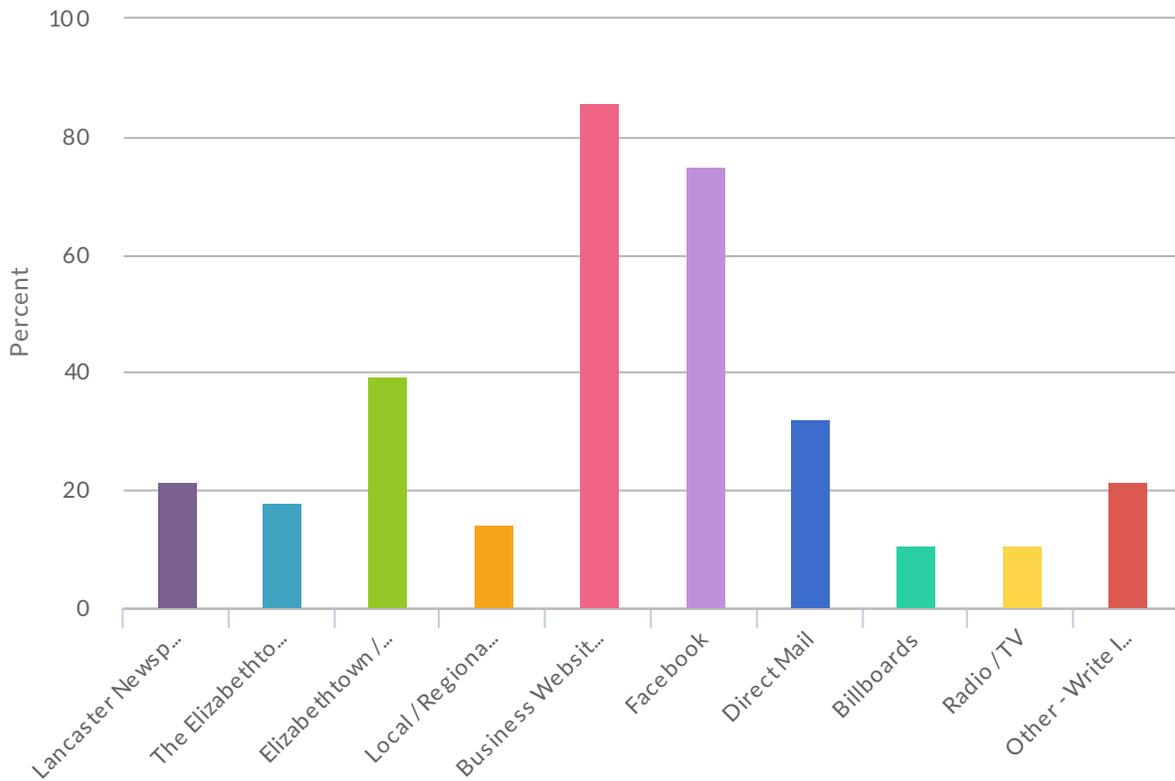
	Fully	Moderately	Minimally	Not At All	Not Our Market
Elizabethtown Borough / Area	6 20.0%	22 73.3%	2 6.7%	0 0.0%	0 0.0%
Elizabethtown College Students	2 6.7%	4 13.3%	14 46.7%	3 10.0%	7 23.3%
Masonic Village Residents	2 6.7%	14 46.7%	9 30.0%	2 6.7%	3 10.0%
Lancaster County Market	3 10.0%	17 56.7%	8 26.7%	1 3.3%	1 3.3%
South Central PA Regional Market	3 10.0%	9 30.0%	14 46.7%	1 3.3%	3 10.0%
National / International Market	2 6.7%	2 6.7%	7 23.3%	8 26.7%	11 36.7%

## 5. Define your business target for age (check all that apply):



Value	Percent	Count
Under 18	53.6%	15
18-25	82.1%	23
26-45	92.9%	26
46-65	100.0%	28
Over 65	82.1%	23

## 6. Which of the following media do you use to market / advertise your business (check all that apply):



Value	Percent	Count
Lancaster Newspaper	21.4%	6
The Elizabethtown Advocate	17.9%	5
Elizabethtown / Mount Joy Merchandiser	39.3%	11
Local / Regional Magazines	14.3%	4
Business Website	85.7%	24
Facebook	75.0%	21
Direct Mail	32.1%	9
Billboards	10.7%	3
Radio / TV	10.7%	3
Other - Write In	21.4%	6

Other - Write In	Count
Events	1
LocalFlavor	1
MoviE-Town	1
We do print and TV through press releases, rarely do we pay for either form of advertising, EventBrite for events, and more	1
clipper ride along post cards/inserts	1
facebook	1
Total	6

## 7. Please rate the degree to which you are experiencing the following business challenges? (mark ONE answer for each item)

	Major Challenge	Minor Challenge	Not a Challenge	Not Applicable
Difficulty recruiting or retaining employees	8 27.6%	6 20.7%	12 41.4%	3 10.3%
Expensive employee wages or benefits	3 10.3%	17 58.6%	2 6.9%	7 24.1%
Expensive or unavailable products	2 6.9%	8 27.6%	10 34.5%	9 31.0%
Insufficient financing	3 10.3%	5 17.2%	15 51.7%	6 20.7%
Insufficient parking	9 31.0%	8 27.6%	11 37.9%	1 3.4%
In-town competition	2 6.9%	11 37.9%	14 48.3%	2 6.9%
Out-of-town competition	5 17.2%	13 44.8%	10 34.5%	1 3.4%
Expensive rent	1 3.3%	5 16.7%	18 60.0%	6 20.0%
Poor building condition	2 6.7%	6 20.0%	21 70.0%	1 3.3%
Shoplifting /Theft/Vandalism	0 0.0%	4 13.3%	22 73.3%	4 13.3%
walk in :Please rate the degree to which you are experiencing the following business challenges? (mark ONE answer for <u>each item</u> )	0 0.0%	1 100.0%	0 0.0%	0 0.0%

8. Could you (or your employees) use information on and/or assistance with the following topics? (mark ONE answer for each item)

	Definitely	Probably	Not Sure	Probably Not	Definitely Not
Business planning	3 10.0%	13 43.3%	2 6.7%	8 26.7%	4 13.3%
Financial management	2 6.7%	12 40.0%	3 10.0%	9 30.0%	4 13.3%
Inventory management	1 3.3%	9 30.0%	2 6.7%	10 33.3%	8 26.7%
Advertising or marketing	8 26.7%	8 26.7%	5 16.7%	5 16.7%	4 13.3%
Employee hiring or training	3 10.0%	7 23.3%	4 13.3%	10 33.3%	6 20.0%
Customer service or hospitality	2 6.7%	11 36.7%	2 6.7%	8 26.7%	7 23.3%
Building improvements	3 10.0%	7 23.3%	3 10.0%	7 23.3%	10 33.3%
Window displays or interior store design	3 10.0%	7 23.3%	1 3.3%	9 30.0%	10 33.3%
Business market analysis	3 10.3%	14 48.3%	2 6.9%	4 13.8%	6 20.7%
Internet or E-Commerce	3 10.0%	16 53.3%	1 3.3%	3 10.0%	7 23.3%
Transfer of ownership or selling a business	3 10.0%	3 10.0%	3 10.0%	6 20.0%	15 50.0%

## 9. Would you find this type of business assistance useful? (mark ONE answer for each item)

	Yes	No	Not Sure
Free design assistance	15 50.0%	8 26.7%	7 23.3%
Free business assistance (planning, operations, marketing, etc.)	18 60.0%	7 23.3%	5 16.7%
Networking events (i.e. breakfast/lunch meetings, business happy hours)	19 63.3%	7 23.3%	4 13.3%
Cooperative insurance program	14 46.7%	11 36.7%	5 16.7%
Cooperative advertising coordination	17 56.7%	9 30.0%	4 13.3%
Advertising / marketing of Downtown Elizabethtown as destination	18 60.0%	9 30.0%	3 10.0%
Low interest loan program (for business or property improvement)	12 40.0%	14 46.7%	4 13.3%
Grant program (for facade or sign improvement)	18 62.1%	6 20.7%	5 17.2%
Downtown Elizabethtown business directories, brochures, maps	18 60.0%	5 16.7%	7 23.3%
Website or Internet resources	17 56.7%	7 23.3%	6 20.0%
Retail / Special Event coordination	15 50.0%	7 23.3%	8 26.7%

## 10. How strongly do you agree or disagree with the following statements? (mark ONE answer for each statement)

	Agree	Neutral	Disagree
I always try to buy products and services locally	24 82.8%	5 17.2%	0 0.0%
I always direct customers to other downtown businesses	27 93.1%	2 6.9%	0 0.0%
I seek ways to cooperate with complementary downtown businesses	22 75.9%	7 24.1%	0 0.0%
I interact with other downtown businesses on a regular basis	23 79.3%	6 20.7%	0 0.0%
The existing downtown business mix helps my business	8 27.6%	19 65.5%	2 6.9%
The look and feel of downtown helps my business.	8 27.6%	14 48.3%	7 24.1%
My building façade draws customers into my business	8 27.6%	18 62.1%	3 10.3%
My window and store displays help my business	10 34.5%	15 51.7%	4 13.8%
My advertising helps my business	18 62.1%	11 37.9%	0 0.0%
My business is open when customers want to shop	15 51.7%	12 41.4%	2 6.9%
Employees of my business show great customer service	26 89.7%	3 10.3%	0 0.0%
Downtown Elizabethtown is an excellent place to have a business	18 62.1%	7 24.1%	4 13.8%
Local police protection is outstanding	20 69.0%	9 31.0%	0 0.0%
I feel safe downtown, even at night.	20 69.0%	8 27.6%	1 3.4%
Local municipal services are accessible and valuable	12 41.4%	16 55.2%	1 3.4%

## 11. How satisfied are you with the present location of your business? (mark ONE)

	Very Satisfied	Satisfied	Neutral	Unsatisfied
Location within the Downtown	14 48.3%	9 31.0%	4 13.8%	2 6.9%
Adequate Space for Current Operations	14 48.3%	8 27.6%	4 13.8%	3 10.3%
Adequate Space for Growth	6 20.7%	8 27.6%	7 24.1%	8 27.6%
Parking	9 31.0%	6 20.7%	4 13.8%	10 34.5%

## 12. Please share any specifics about your dissatisfaction with your current location, space or parking.

Count	Response
1	Cannot expand due to flood zone regulations.
1	Customers complain that it's difficult to find a parking space and have to often leave to feed the meter because time is too limited. Parking tickets are something everyone complains about!!
1	It is hard to feel good about my location when staff and customers are continually receiving parking tickets even late at night.
1	Not Enough Parking In The Down Town!!!
1	Parking is tough- they can cut back on meter parking- this will attract more business downtown.
1	There is limited, virtually no economical way for us to grow and, if we do, there is no where for our primary customers to park. There may officially be "no parking problem" however, families with young children, old people, and many others struggle with parking, perceive a parking problem and therefore...we HAVE A PARKING PROBLEM!
1	There isn't enough
1	We would much rather be on the main drag but the space we are renting came with a full kitchen which saved us a lot. Parking is such a huge problem though. Etown residents are accustomed to it but people out of town are not. I wish someone would buy the Moose and put up a parking lot.
1	Where we are located there is no parking and it is noisy. Otherwise it's great for visibility but many times the cons outweigh the pros.

# Appendix A

# Nielsen PRIZM® and PRIZM® Premier Segments | Characteristic Lists

## Lifestage Groups

### Younger Years

- Y1 Midlife Success
- Y2 Young Achievers
- Y3 Striving Singles

### Family Life

- F1 Accumulated Wealth
- F2 Young Accumulators
- F3 Mainstream Families
- F4 Sustaining Families

### Mature Years

- M1 Affluent Empty Nests
- M2 Conservative Classics
- M3 Cautious Couples
- M4 Sustaining Seniors

## Social Groups

### Urban

- U1 Urban Uptown
- U2 Midtown Mix
- U3 Urban Cores

### Suburban

- S1 Elite Suburbs
- S2 The Affluentials
- S3 Middleburbs
- S4 Inner Suburbs

### Second City

- C1 Second City Society
- C2 City Centers
- C3 Micro-City Mix

### Town and Rural

- T1 Landed Gentry
- T2 Country Comfort
- T3 Middle America
- T4 Rustic Living

## Income Producing Assets

- Millionaires
- Elite
- High
- Above Avg.
- Moderate
- Below Avg.
- Low

## Household Age

- Age <55
- Age 25-44
- Age 35-54
- Age 45-64
- Age 55+
- Age 65+

## Education

- Graduate Plus
- College Graduate
- Some College
- High School

## Employment

- Management and Professional
- Mix
- Service Mix
- Blue Collar Mix
- Mostly Retired

## Race & Ethnicity

- White
- White, Asian, Mix
- White, Asian, Hispanic, Mix
- White, Black, Mix
- White, Black, Asian, Mix
- White, Black, Asian, Hispanic, Mix
- White, Black, Hispanic, Mix

## Household Income

- Wealthy
- Upscale
- Upper Mid
- Midscale
- Lower Mid
- Downscale
- Low Income

## Household Composition

- Mostly w/ Kids
- Family Mix
- Mostly w/o Kids
- HH w/o Kids

## Household Tenure

- Homeowners
- Mostly Owners
- Mix
- Mostly Renters
- Renters

## Household Technology

- Highest
- Above Average
- Average
- Below Average
- Lowest

## Urbanicity

- Urban
- Suburban
- Second City
- Town
- Rural
- Metro Mix

Source: [www.segmentationsolutions.nielsen.com](http://www.segmentationsolutions.nielsen.com)

## Appendix B

## Downtown Elizabethtown Business Owner Survey / Winter 2016

### **CONTACT INFORMATION**

Business Name: \_\_\_\_\_

Business Owner(s): \_\_\_\_\_

Primary Contact: \_\_\_\_\_

Email: \_\_\_\_\_

Business Address: \_\_\_\_\_

Business Phone #1: \_\_\_\_\_ FAX: \_\_\_\_\_

Website: \_\_\_\_\_

### **MARKET AND MARKETING DATA**

1. What are the hours of operation for your business?

Monday from _____ to _____	Friday from _____ to _____
Tuesday from _____ to _____	Saturday from _____ to _____
Wednesday from _____ to _____	Sunday from _____ to _____
Thursday from _____ to _____	

2. What are your thoughts on business hours? (● mark "X" for all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> I am open all the hours I need to be                           | <input type="checkbox"/> I can't be open more hours for personal reasons               |
| <input type="checkbox"/> I should be open more hours, but <u>can't afford</u> the staff | <input type="checkbox"/> I should be open more hours, but <u>can't find</u> good staff |
| <input type="checkbox"/> I would be open more hours if I were sure of sales             | <input type="checkbox"/> I would be open more hours if everyone else were              |

3. During a typical week, what are the seven busiest times for your business? (● mark "X" up to SEVEN times total for the week)

	Before 11:00 AM	11:00 AM – 2:00 PM	2:00 PM – 5:00 PM	After 5:00 PM
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

4. What are the three busiest months of the year for your business? (● mark up to THREE)

- |                                  |                                   |                                    |
|----------------------------------|-----------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> February | <input type="checkbox"/> March     |
| <input type="checkbox"/> April   | <input type="checkbox"/> May      | <input type="checkbox"/> June      |
| <input type="checkbox"/> July    | <input type="checkbox"/> August   | <input type="checkbox"/> September |
| <input type="checkbox"/> October | <input type="checkbox"/> November | <input type="checkbox"/> December  |

5. How many customers/clients visit your business per week during the summer months of May to October? (● mark ONE)

- none, all business via phone, Internet, etc.  less than 50  50-250  250-500  Over 500

6. How many customers/clients visit your business per week during the winter months of November to April? (● mark ONE)

- none, all business via phone, Internet, etc.  less than 50  50-250  250-500  Over 500

7. Do special events increase foot traffic or sales volume for your business, either during the event or in the next few days or weeks? (● mark ALL that apply)

- Yes  No  Don't Know

Please Provide Any Additional Comments You Have on Special Events in the Downtown:

8. Are you open to participating in a consumer survey / point of purchase survey in your business?

- Yes  No  Need More Information

9. What percentage of the annual advertising budget for your business is spent with each of the following media? (Total should = 100%)

- |                                     |                              |
|-------------------------------------|------------------------------|
| a. ___% Newspapers                  | f. ___% Direct Mail/Catalogs |
| b. ___% Magazines                   | g. ___% Window Displays      |
| c. ___% Radio                       | h. ___% Billboards           |
| d. ___% Television                  | i. ___% Internet             |
| e. ___% Local Service Organizations | j. ___% Other _____(specify) |

10. Please describe the target market of your business. (● Mark ONE for each of the three categories below)

Gender  Male  Female

Age  under 18  18-24  25-44  45-54  55-64  Over 64

Annual household income (you may mark multiple ranges, if necessary)

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> under \$15,000      | <input type="checkbox"/> \$35,000 - \$49,999 | <input type="checkbox"/> \$100,000 - \$149,999 |
| <input type="checkbox"/> \$15,000 - \$24,999 | <input type="checkbox"/> \$50,000 - \$74,999 | <input type="checkbox"/> over \$150,000        |
| <input type="checkbox"/> \$25,000 - 34,999   | <input type="checkbox"/> \$75,000 - \$99,999 |  |

11. Check any of the following media that you use to advertise your business?

- Newspaper  Local/Regional Magazines  Television  Radio  Website

12. What is the toughest competition for your business? (specify up to THREE competitors by name)

- a. \_\_\_\_\_  
b. \_\_\_\_\_  
c. \_\_\_\_\_

13. To what degree do the following traits help make your business more competitive versus the businesses listed above?  
 (● mark ONE answer for each item)

	A Lot	A Little	Not At All
Your Location.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Parking.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Hours.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Service.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Name Brands.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Quality.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Selection.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Price.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Relative to other businesses in your trade, what price point do you target? (● mark ONE)

- low-end       average       high-end

15. What three downtown businesses complement your business the most? (specify up to THREE businesses by name)

- a. \_\_\_\_\_  
 b. \_\_\_\_\_  
 c. \_\_\_\_\_

16. What are the two biggest non-work reasons people stop in Downtown Elizabethtown? (i.e. business, attraction, or activity)

Reason #1

Reason #2

17. Name four types of and/or specific businesses you would most like to see locate in Downtown Elizabethtown?

- 
- 
- 
- 

18. To what degree are you capturing the following customers/markets?

	Fully	Moderately	Minimally	Not At All	Not Our Market
Elizabethtown Borough/Area.....	<input type="checkbox"/>				
Elizabethtown College Students.....	<input type="checkbox"/>				
Masonic Village Residents.....	<input type="checkbox"/>				
Lancaster County Market.....	<input type="checkbox"/>				
South Central PA Market.....	<input type="checkbox"/>				
National/International Market.....	<input type="checkbox"/>				

## NEEDS AND OPPORTUNITIES ASSESSMENT

19. Please rate the degree to which you are experiencing the following business challenges? (● mark ONE answer for each item)

	Major Challenge (-3)	Minor Challenge (-2)	Don't Know (-1)	No Challenge (0)
Conflict with building owner or tenant.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulty recruiting or retaining employees.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive or unavailable products.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive employee wages or benefits.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive rent.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive shipping or transportation.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insufficient financing.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insufficient parking.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In-town competition.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out-of-town competition.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language barriers.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor building condition.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restrictive business regulations.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shoplifting or theft.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unskilled workers.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vandalism.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please Provide Any Additional Comments You Have on Business Challenges:

20. Could you or your employees use information on or assistance with the following topics? (● mark ONE answer for each item)

	Definitely (2)	Probably (1)	Unsure (0)	Probably Not (-1)	Definitely Not (-2)
Business planning.....	<input type="checkbox"/>				
Financial management.....	<input type="checkbox"/>				
Inventory management.....	<input type="checkbox"/>				
Advertising or marketing.....	<input type="checkbox"/>				
Employee hiring or training.....	<input type="checkbox"/>				
Customer service or hospitality.....	<input type="checkbox"/>				
Building improvements.....	<input type="checkbox"/>				
Window displays or interior store design.....	<input type="checkbox"/>				
Business market analysis.....	<input type="checkbox"/>				
Internet or E-Commerce.....	<input type="checkbox"/>				
Transfer of ownership or selling a business.....	<input type="checkbox"/>				
Other.....	<input type="checkbox"/>				

Please Provide Any Additional Comments You Have on Areas of Business Assistance:

21. How useful would you find these products and services for your business? (● mark ONE answer for each item)

	Very Useful (3)	Useful (1)	Don't Know (-1)	Useless (-3)
Free design assistance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free business assistance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking events (i.e. breakfast/luncheon meetings, business after hours)...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group business training (i.e. workshops, speakers).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workforce development.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooperative insurance program.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business expos or trade shows.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooperative advertising coordination.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertising / marketing of Downtown Elizabethtown as shopping destination...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low interest business loan program.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low interest building improvement loan program.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Façade grant.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sign grant.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Landlord-tenant or seller-buyer referral network.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information sharing (i.e. newsletters, flyers, business fact sheets).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Downtown Elizabethtown public improvement projects (list examples).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business resource library or consultant referrals.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Downtown Elizabethtown business directories, brochures, maps.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web site or Internet resources.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Downtown Elizabethtown ambassadors, mentors or sister stores.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individual business training (i.e. videotape training programs on loan).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business visitation program.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analysis and reporting of the downtown market / economy.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retail event coordination.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special event coordination (increasing foot traffic – or list examples).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boilerplate lease agreements or rent subsidies.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arbitration service.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business planning service.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please Provide Any Additional Comments You Have on Services / Products for Downtown:

22. How strongly do you agree or disagree with the following statements? (● mark ONE answer for each statement)

	Strongly Agree (2)	Somewhat Agree (1)	Neutral (0)	Somewhat Disagree (-1)	Strongly Disagree (-2)
Local police protection is outstanding.....	<input type="checkbox"/>				
I feel safe downtown, even at night.....	<input type="checkbox"/>				
Local municipal services are accessible and valuable.....	<input type="checkbox"/>				
I always try to buy products and services locally.....	<input type="checkbox"/>				
I always direct customers to other downtown businesses.....	<input type="checkbox"/>				
I seek ways to cooperate with complementary downtown businesses.....	<input type="checkbox"/>				
The existing downtown business mix helps my business.....	<input type="checkbox"/>				
The look and feel of downtown helps my business.....	<input type="checkbox"/>				
My building façade draws customers into my business.....	<input type="checkbox"/>				
My window and store displays help my business.....	<input type="checkbox"/>				
My advertising helps my business.....	<input type="checkbox"/>				
My business is open when customers want to shop.....	<input type="checkbox"/>				
Employees of my business show great customer service.....	<input type="checkbox"/>				
Childcare for employees and customers is readily available.....	<input type="checkbox"/>				
Downtown Elizabethtown is an excellent place to have a business.....	<input type="checkbox"/>				

23. How satisfied are you with the present location of your business? (● mark ONE)

- Very Satisfied       Satisfied  
 Neutral               Unsatisfied  
 Very Unsatisfied     Plan to Move

Why?

24. Do you have plans to expand or reduce operations for your business in the foreseeable future? (● mark ONE)

- I plan to expand products/services or square footage downtown.  
 I plan to expand products/services or square footage at a location outside the downtown.  
 I plan to reduce products/services or square footage downtown.  
 I don't have any plans for changes.

25. Are you, or the building owner, considering any building improvement projects?  Yes  No  Don't Know

What type?

**BUSINESS AND WORKFORCE DATA**

26. What are the total sales/revenue for your businesses most recent fiscal year?

- under \$50,000     \$50,000-\$100,000     \$100,000-\$500,000     \$500,000-\$1,000,000     over \$1,000,000

27. How long has your business been in operation? (● mark ONE, include time at this & any previous locations)

- under 1 year     1-5 years     6-10 years     11-20 years     over 20 years

If you know the date your business was established, please list it here (MM / YY) \_\_\_\_\_

28. How long have YOU been the owner of your business? (● mark ONE)

- under 1 year     1-5 years     6-10 years     11-20 years     over 20 years

29. Does your business own or lease the space in which it is located?     Own     Lease     Lease, want to purchase

If you lease your space, what is your monthly rent?

30. For your business, how many square feet are devoted to the following?

	a. Sales Space		c. Storage Space		e. Production Space
	b. Office Space		d. Unused Space		f. Total Space

31. Where do your customers typically park? (● mark ONE)

- On the street     In a private parking lot     In a public parking lot     Other \_\_\_\_\_

How far do customers typically have to park from your business? (● mark ONE)

- Near entry     1 block away     3 blocks away  
 ½ block away     2 blocks away     4 blocks or more

If you own a parking lot, how many parking spaces are available for customers (not employees)?

32. Where do you and your employees typically park? (● mark ONE)

- On the street     In a private parking lot     In a public parking lot     Other \_\_\_\_\_

How far do you and your employees typically have to park from your business? (● mark ONE)

- Near entry     1 block away     3 blocks away  
 ½ block away     2 blocks away     4 blocks or more

If you own a parking lot, how many parking spaces are available for employees (not customers)?

33. What percentage of the employees of your business live here in Elizabethtown Borough? \_\_\_\_\_ %

34. How many people, including owners, does your business employ in each of the following categories?  
(Full-time = 32 or more hours/week)

Full-time year-round \_\_\_\_\_    Part-time year-round \_\_\_\_\_    Seasonal \_\_\_\_\_