

Assessment Presentation

Anderson, South Carolina

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This Evening's Presentation

- *Input summary: what we've heard*
- *Zip code report*
- *Market definition*
- *Retail leakage study*
- *Retail shares study*
- *Preliminary conclusions*

What we've heard: Strengths

- *Anderson University*
- *Downtown Library*
- *Farmers Market*
- *GAMAC*
- *Russian Festival big success*
- *Soiree*
- *Museum*
- *Arts Center*
- *Easy accessibility*
- *New streetscapes*
- *Certain businesses: coffee shop (E City Java), restaurants, etc.*

What we've heard: Opportunities

- *Opportunity to draw from a large trade area stretching into Georgia, Keowee etc.*
- *New residential downtown in Chiquola and Calhoun*
- *Opportunity for enhanced collaboration between City and AU*
- *Opportunity for Anderson to be a cultural destination.*
 - *Artist trail*
 - *Performing arts*

What we've heard: Opportunities

- *Belk Building site opportunity for redevelopment.*
- *Opportunity to tool events as real “retail” events rather than just activities.*
- *Viaduct as an “underground Anderson”*

What we've heard: Challenges

- *Need to enforce maintenance codes and upkeep of buildings*
- *Lack of signing directing people to downtown district -- wayfinding.*
- *Skepticism about major projects' ability to be successful.*
- *Soiree clientele doesn't match clientele trying to attract downtown.*
- *No 'regular' events downtown*
- *Difficult to market Anderson to the Greenville market.*
- *No marketing piece for downtown.*

What we've heard: Challenges

- *Little nightlife downtown.*
- *Need to pull together as a downtown more*
- *No champion for downtown.*
- *Downtown lacks a unifying theme or image.*
- *Perceived parking problem.*
- *Difficult to get downtown from the lake*
- *Alcohol regulations*
- *Thunderbird Motel*
- *Too much emphasis on personalities and not enough on philosophies.*

What we've heard: Threats

- *Factions among merchants.*
- *Vagrancy problem/panhandling.*
- *Downtown does not market itself.*
- *Inconsistent application of "the rules."*
- *Concern for losing additional historic fabric downtown -- lack of preservation ethic.*
- *Dirt, trash and maintenance.*

Needs and Desires

- *Performance Center.*
- *Conference Center - place for community functions.*
- *Full service hotel.*
- *Grocer, Fresh Market/Whole Foods etc.*
- *Recreation and common space for citizens in town.*
- *Downtown shopping and dining guide.*
- *Greater variety of restaurants, brewpub, other niches.*
- *More niche shopping.*
- *Need to draw young people downtown.*
- *24 hour downtown.*
- *Downtown Wi-Fi*
- *An overall master plan for downtown.*
- *Need to proactively recruit retailers.*

Visions and Quotes

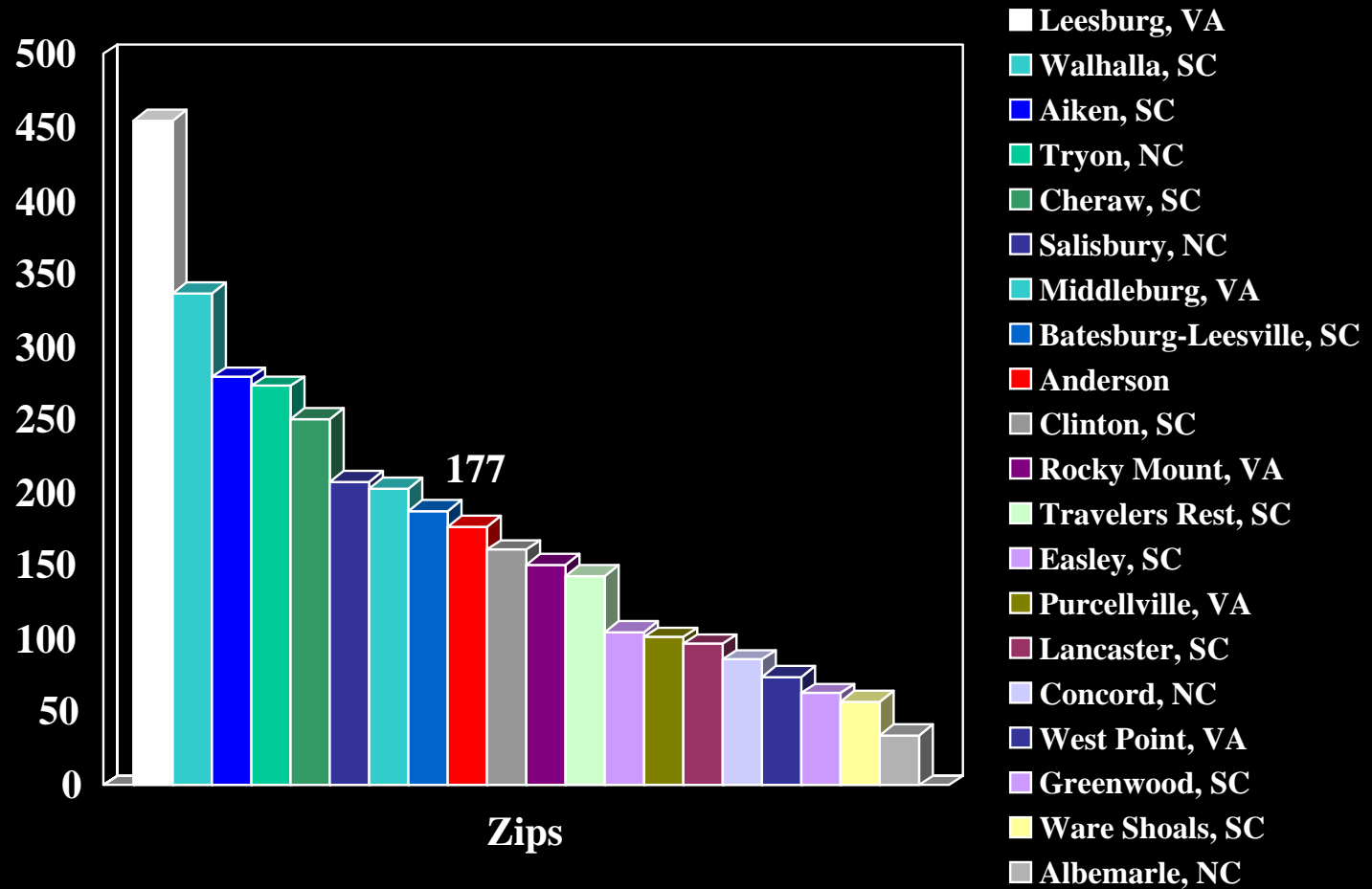
- *A “mini-Greenville”*
- *Would like a downtown like Aiken*
- *“Do we know what we want to look like in 10 years?”*
- *“Downtown is on the verge of an explosion of growth”*
- *“Anderson is no longer hot-dog-ville”*

Market Analysis - Zip Code

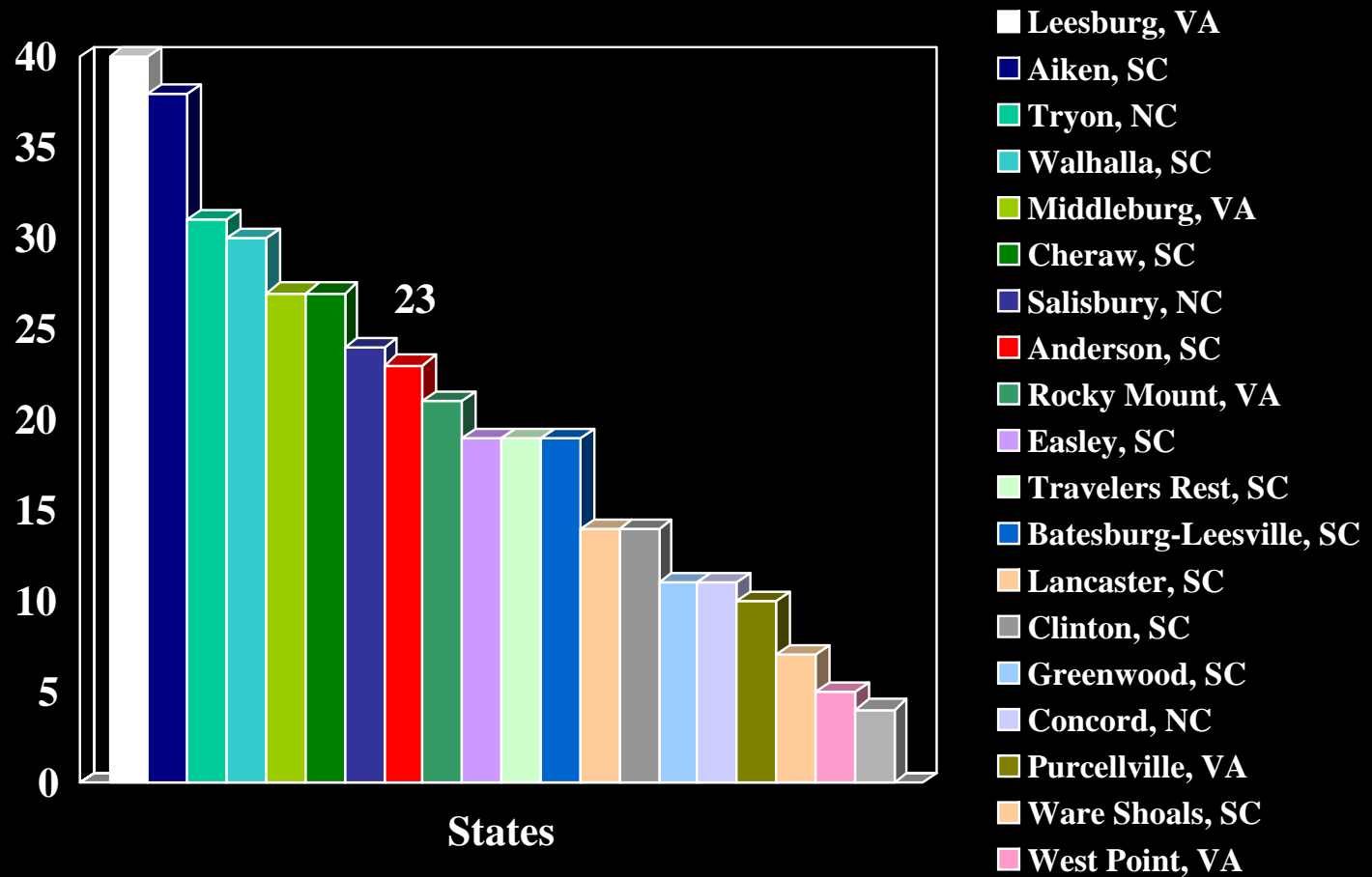
Survey

- *Survey – May 4th – 12th*
- *32 Businesses tallied*
- *2862 Recorded Visits*
- *177 Unique Zip Codes*
- *23 Unique States*
- *7 foreign countries*

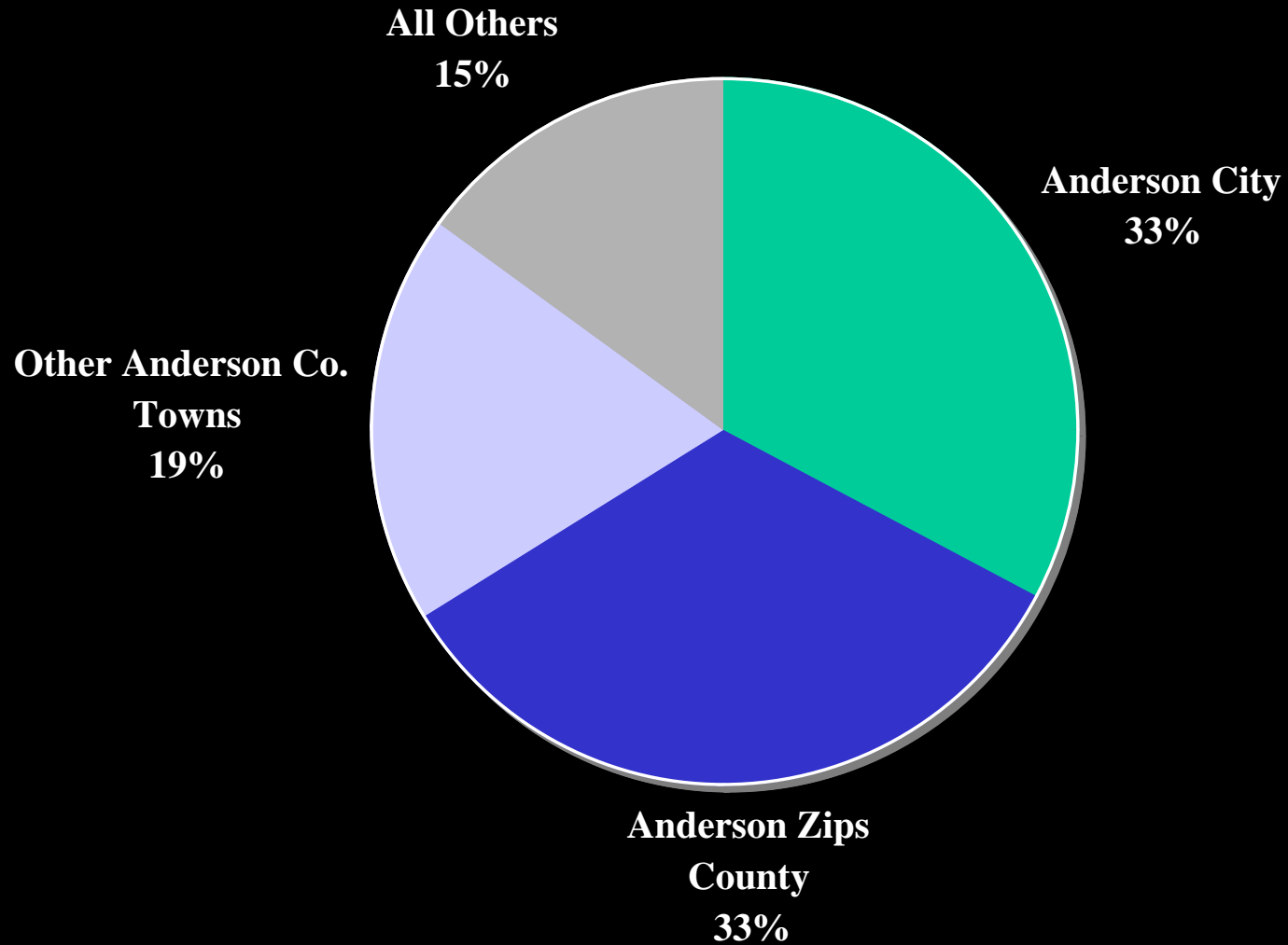
Zip Comparisons



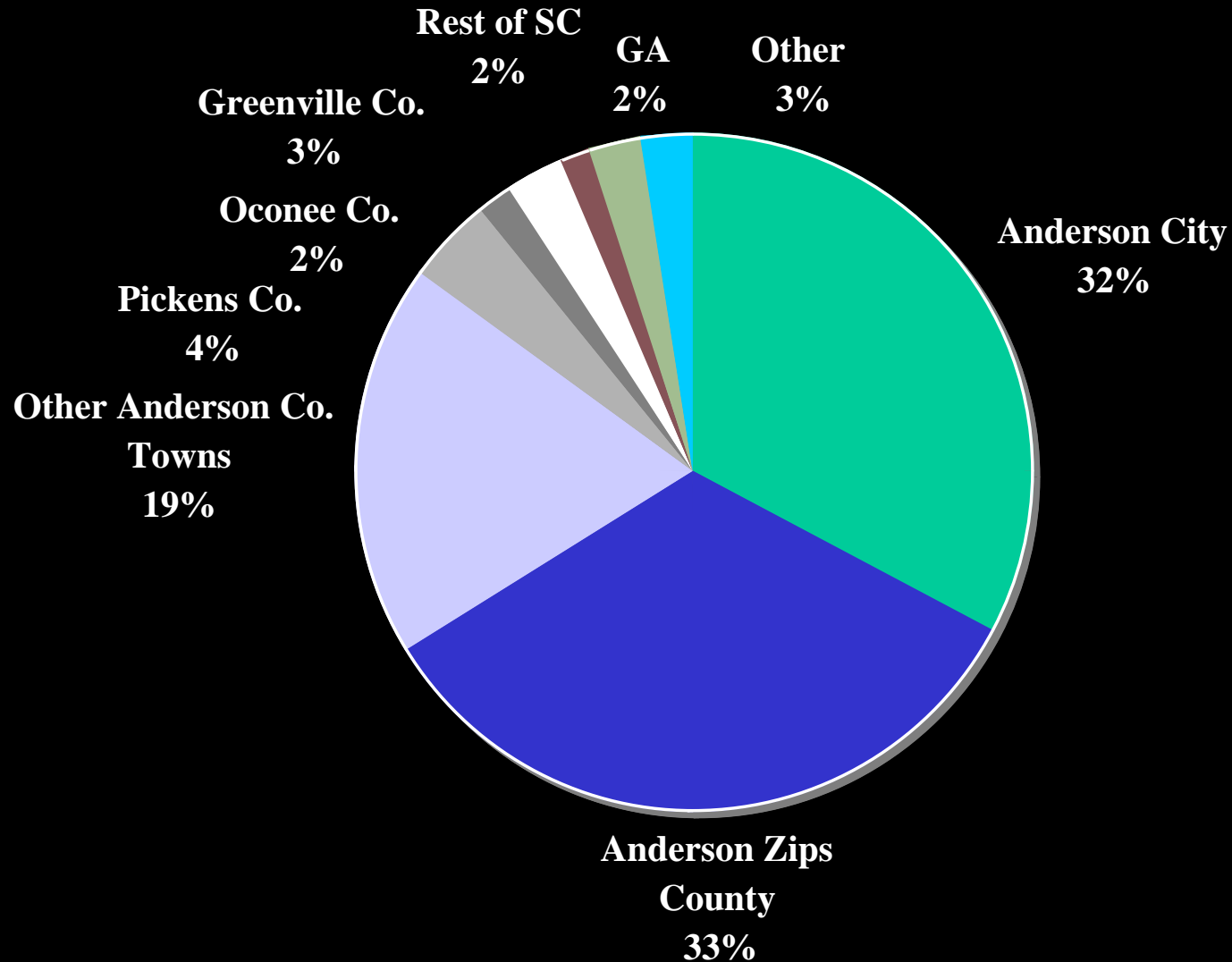
State Comparisons



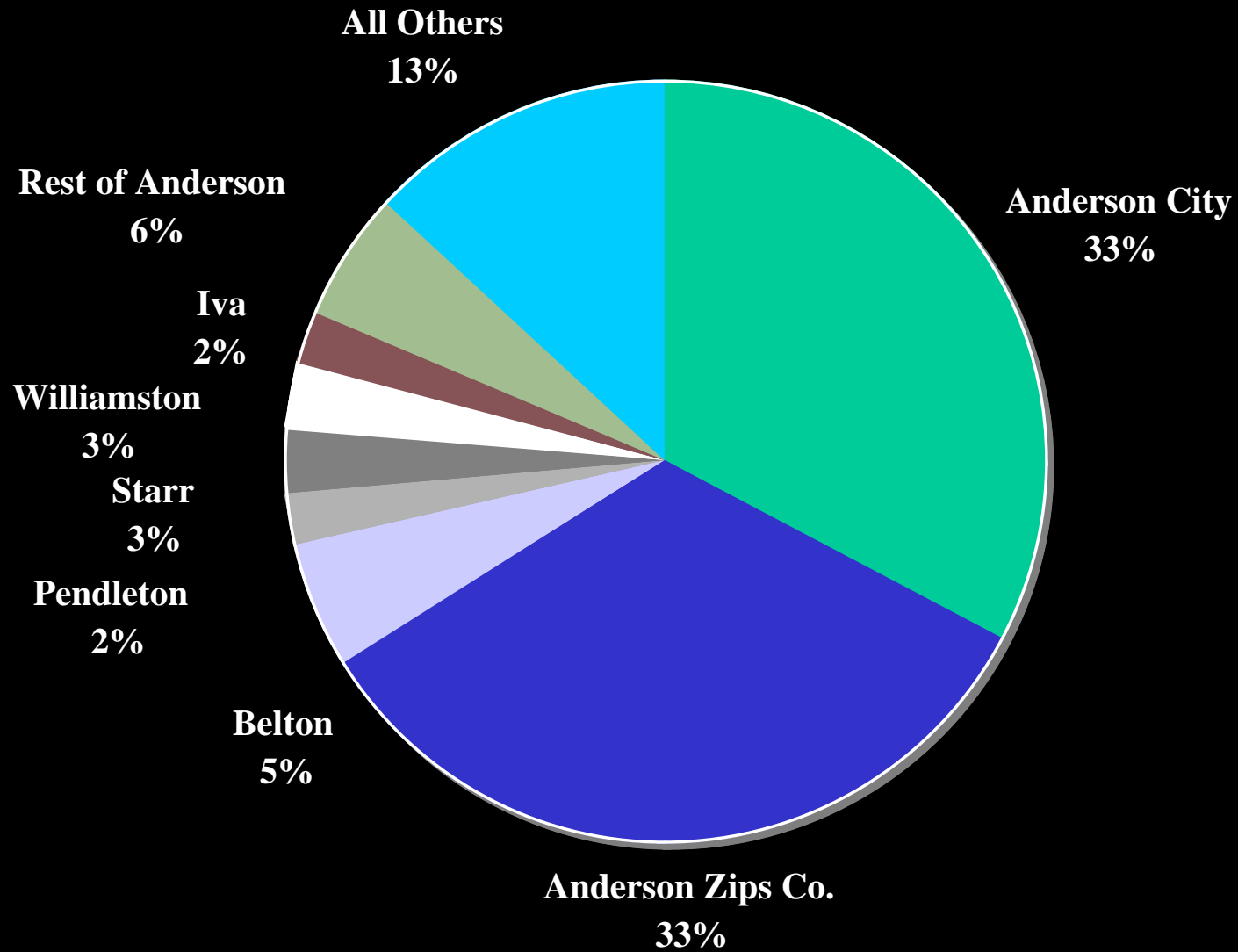
Where are they from?



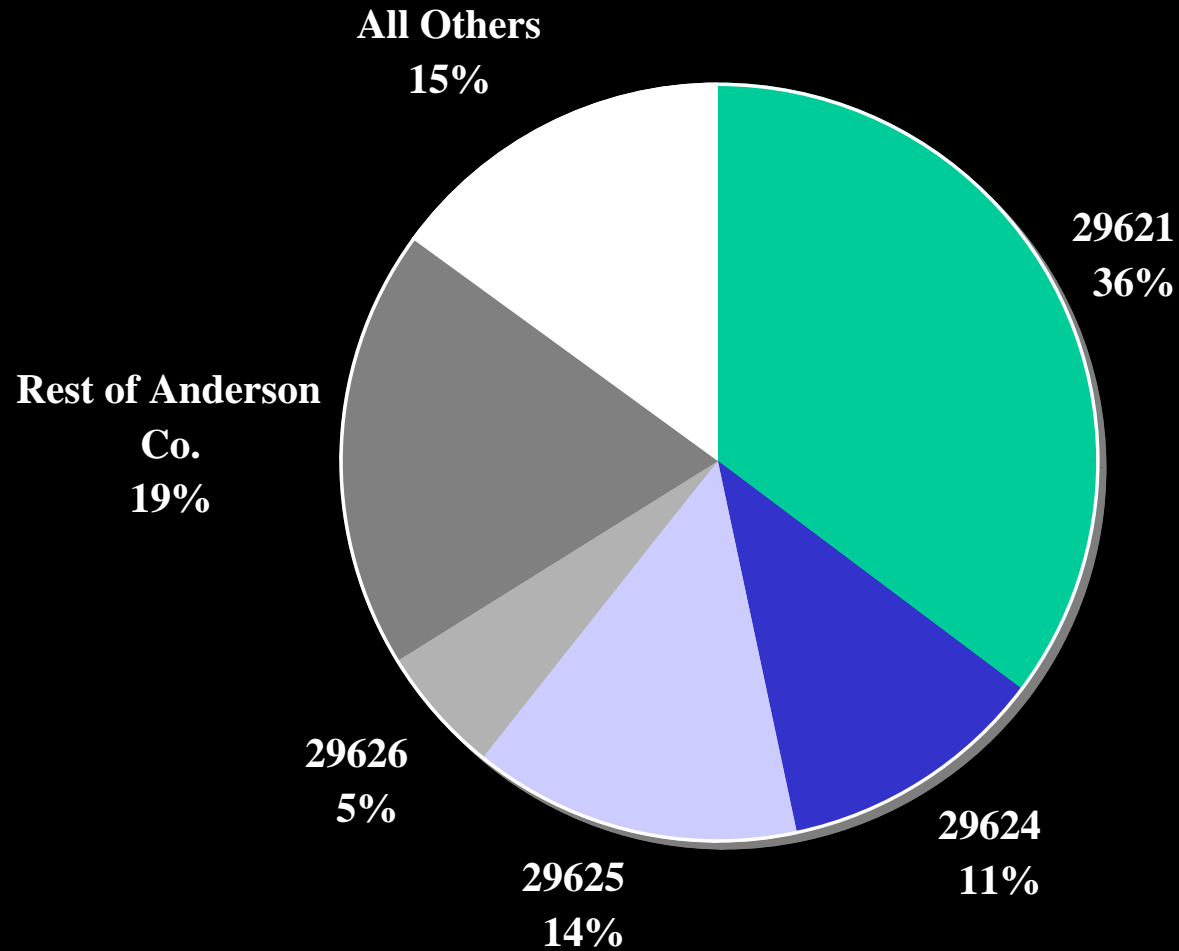
Where are they from? (take 2)



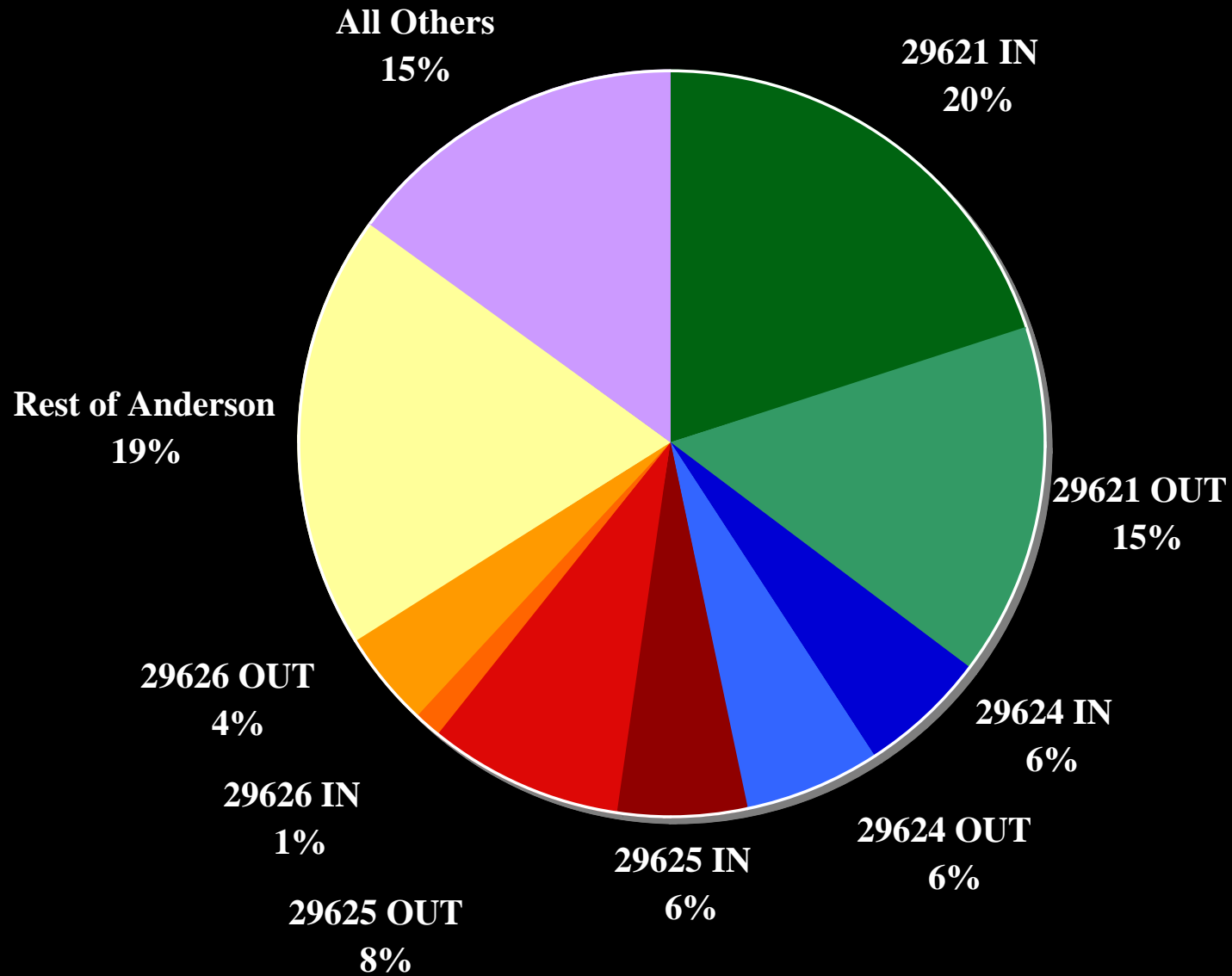
Where are they from?



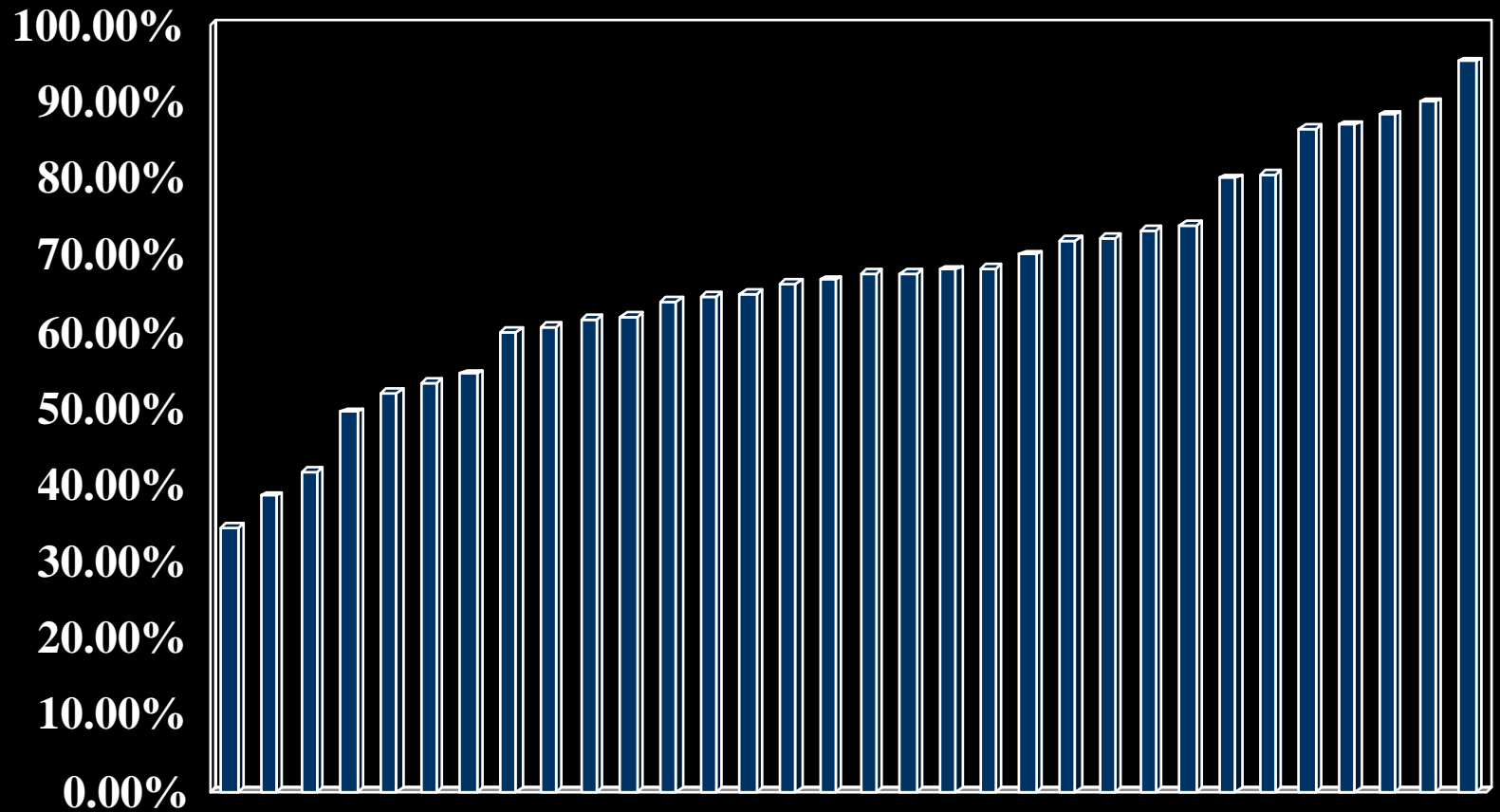
Where are they from?



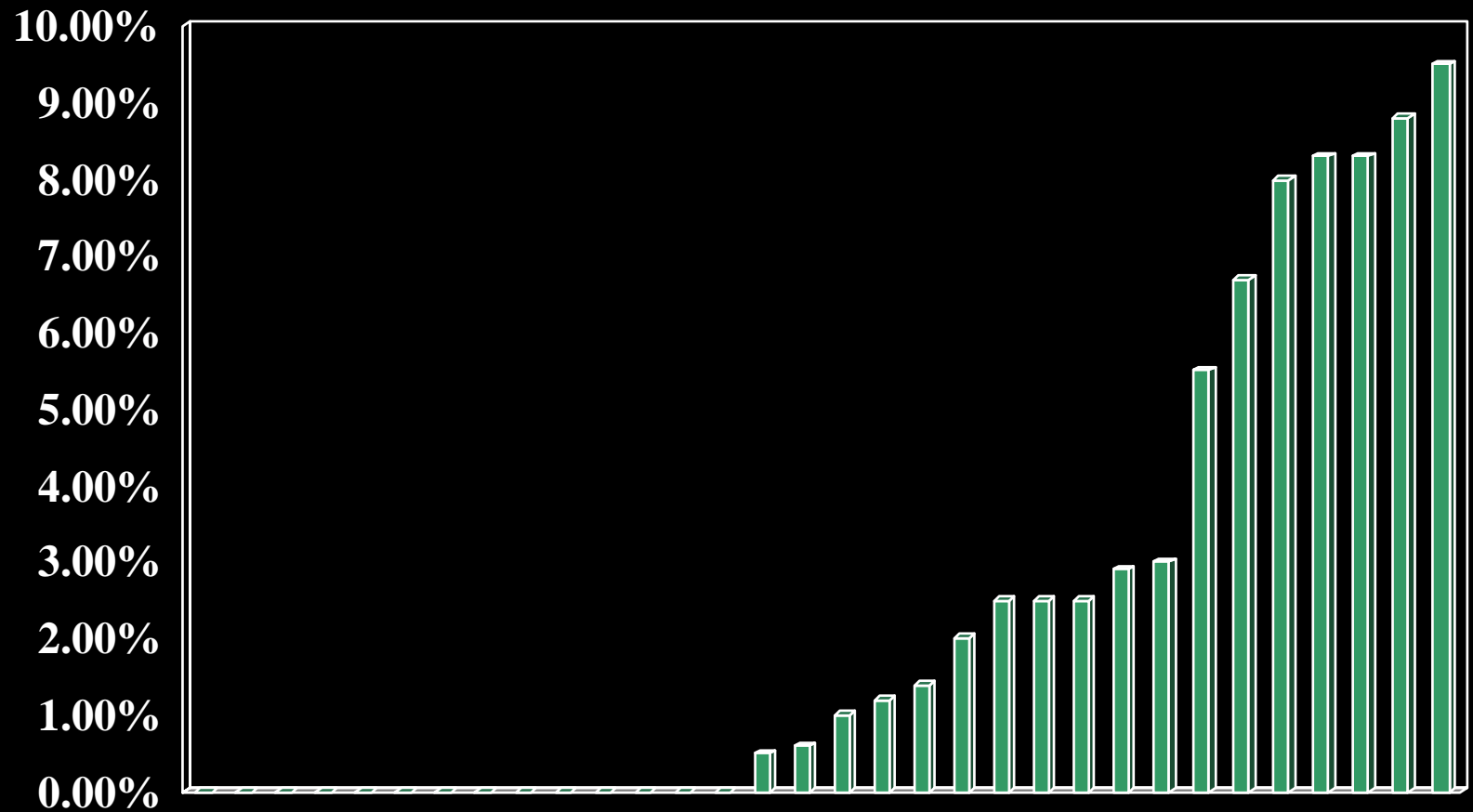
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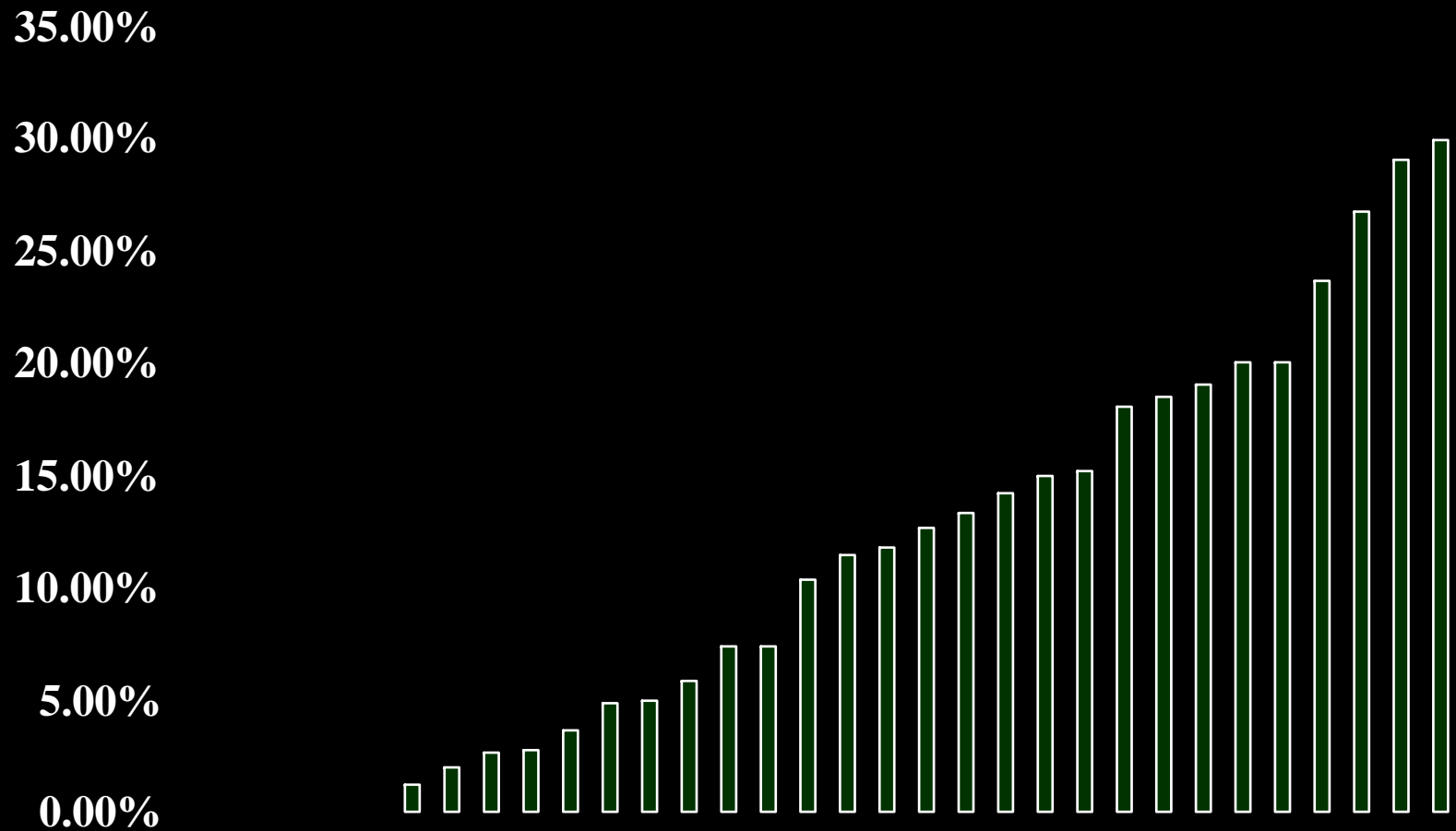
Percent Anderson Zip by Business



Percent Georgia by Business



Percent "Tourist" by Business

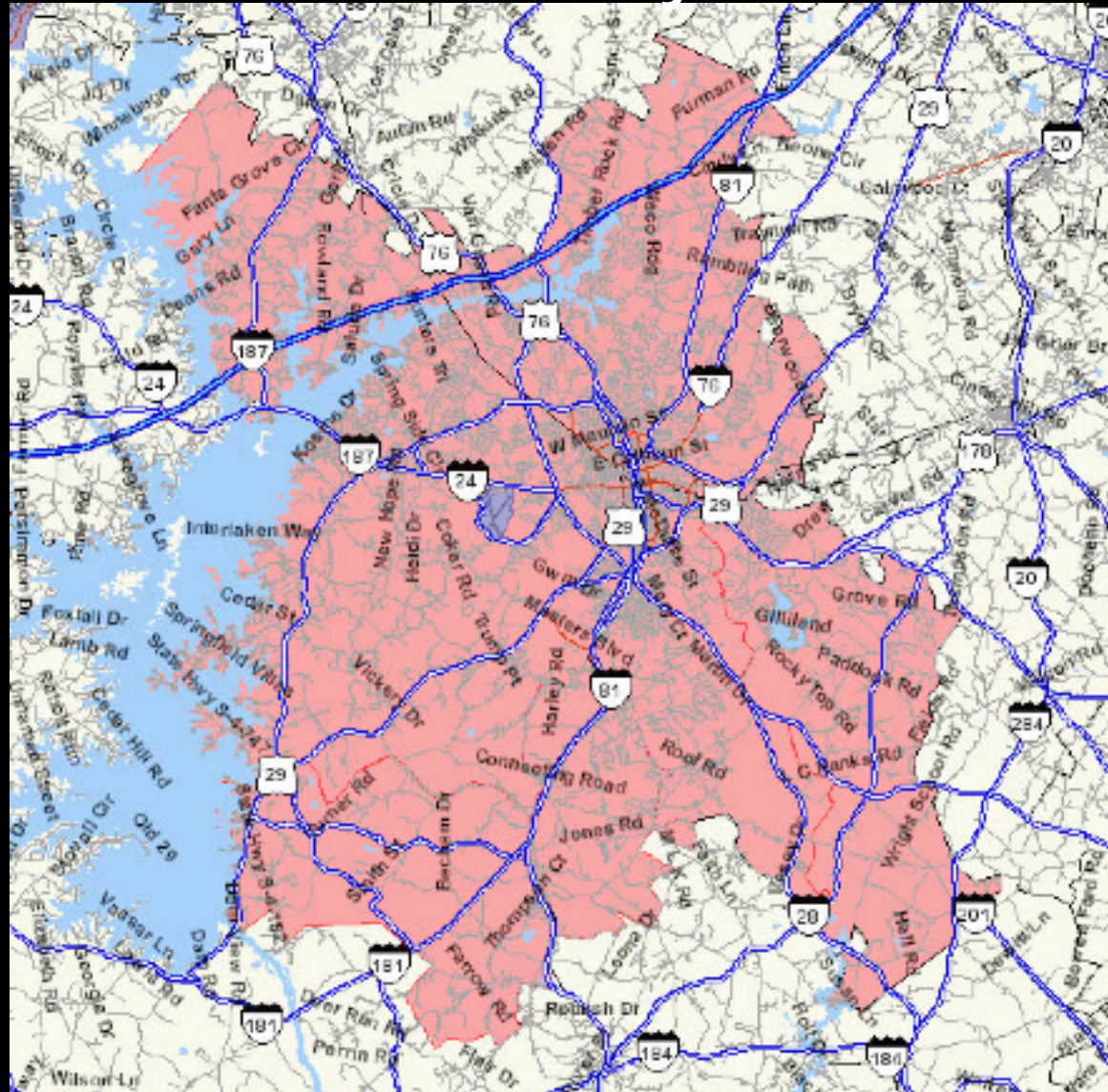


The Trade Area Defined

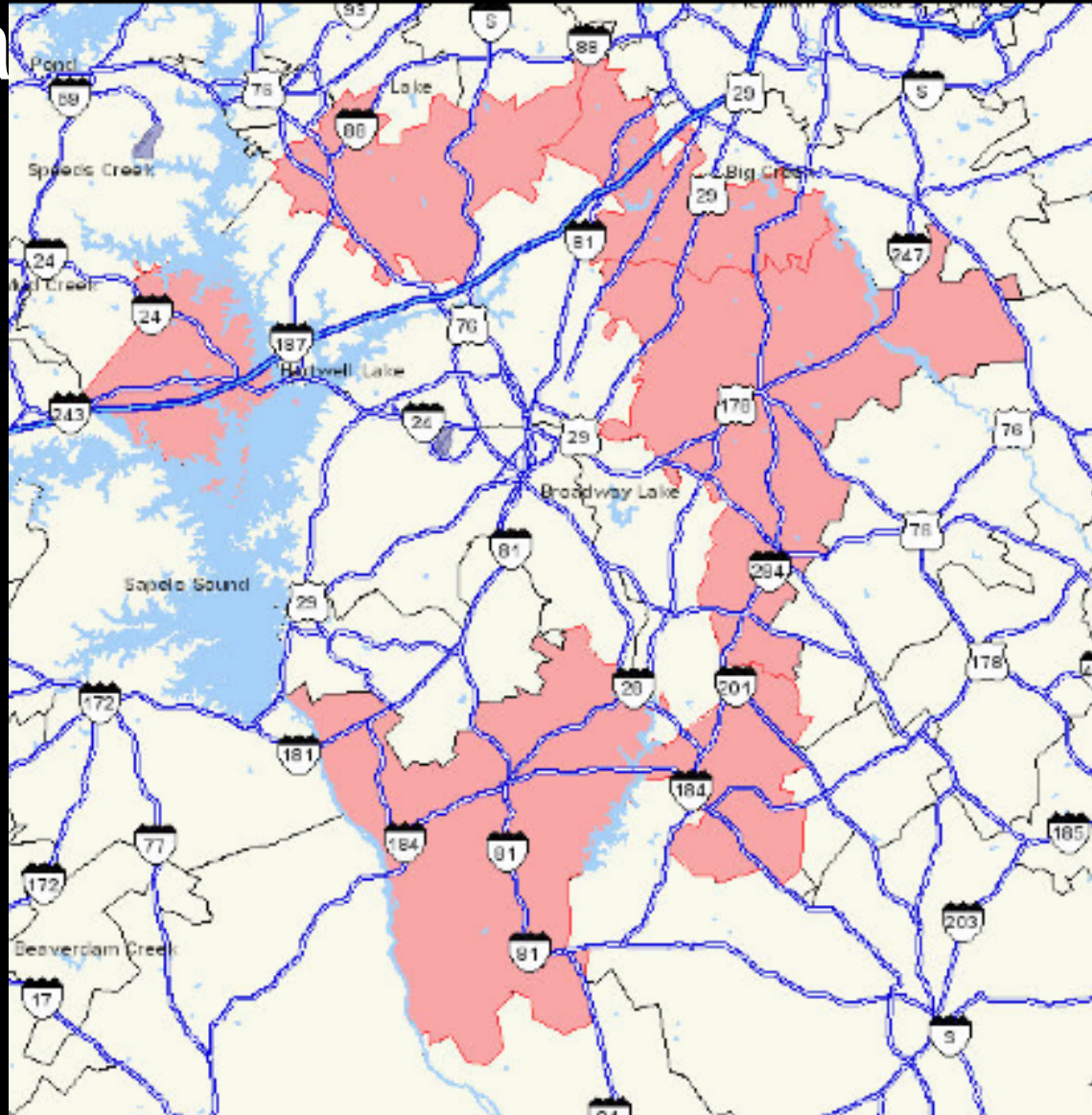
Zip Code	City	State	Total		
29621	Anderson	SC	1009	35,310	28.6
29624	Anderson	SC	326	15,434	21.1
29684	Starr	SC	83	4,325	19.2
29625	Anderson	SC	405	24,652	16.4
29626	Anderson	SC	152	12,878	11.8
29655	Iva	SC	65	7,675	8.5
29670	Pendleton	SC	64	8,010	8.0
29627	Belton	SC	150	18,892	7.9
29697	Williamston	SC	76	11,369	6.7
29689	Townville	SC	24	4,134	5.8
29631	Clemson	SC	41	11,627	3.5
29654	Honea Path	SC	32	9,694	3.3
29630	Central	SC	17	12,507	1.4
29669	Pelzer	SC	16	12,363	1.3
29672	Seneca	SC	11	10,241	1.1
30643	Hartwell	GA	16	14,937	1.1
29657	Liberty	SC	14	15,097	0.9
29678	Seneca	SC	18	20,185	0.9
29673	Piedmont	SC	13	23,949	0.5
29642	Easley	SC	12	26,608	0.5

Anderson Zips	SC	1740	88274	19.7
OUT (zips)	SC	837	62712	13.3
Anderson City	SC	903	25562	35.3

Anderson Primary Trade Area



Anderson Secondary Trade Area



Some Preliminary Observations

- *Anderson's downtown is a highly localized market (85% of the customers are from Anderson County)*
- *Very few visitors are coming to the downtown from other places. There is VERY little shop browsing.*
- *Customers from the City of Anderson are much more loyal to downtown shops.*
- *The close-in trade area is largely circular (this is a bit of a surprise).*

A Glance at the Primary Trade

Area

- *The 2005 population of the PTA is estimated at 91,195.*
- *This population has increased 4.25% since 2000.*
- *By 2010 this population will increase by another 4.40% to 95,208.*
- *2005 Estimated Per capita income is \$21,295.*
- *Median household income is \$40,187*

A Glance at the Secondary Trade

Area

- *The 2005 population of the STA is estimated at 49,628.*
- *This population has increased 4.54% since 2000.*
- *By 2010 this population will increase by another 4.93% to 52,075.*
- *2006 Estimated Per capita income is \$19,954*
- *Median household income is \$39,647*

Retail Leakage Study

A study to establish the retail dollars leaving or entering a community from its primary and secondary trade areas.

Current Year Trade Area

Statistics

- *PTA Selected Store Sales \$1.097 Billion*
- *PTA Consumers spent \$819.2 million*
- *Anderson Primary Trade Area is GAINING \$278.7 million annually overall each year.*
- *STA Store Sales \$327.5 Million*
- *STA Consumers spend \$443.3 million*
- *Secondary Trade Area is leaking sales in the amount of \$115.8 million each year.*
- *Combined trade area is still gaining: \$162.9 million.*

Anderson PTA Retail Leakage 1 of 3

	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	819,261,674	1,097,939,134	-278,677,460
Furniture and Home Furnishings Stores-442	31,174,109	24,366,044	6,808,065
Furniture Stores-4421	17,384,599	13,079,946	4,304,653
Home Furnishing Stores-4422	13,789,510	11,286,098	2,503,412
Electronics and Appliance Stores-443	28,025,503	31,338,698	(3,313,195)
Appliances, TVs, Electronics Stores-44311	18,067,341	27,926,823	(9,859,482)
Household Appliances Stores-443111	3,324,509	10,309,011	(6,984,502)
Radio, Television, Electronics Stores-443112	14,742,832	17,617,812	(2,874,980)
Computer and Software Stores-44312	9,013,687	2,252,875	6,760,812
Camera and Photographic Equipment Stores-44313	944,475	1,159,000	(214,525)
Building Material, Garden Equip Stores -444	129,013,816	117,765,337	11,248,479
Building Material and Supply Dealers-4441	116,330,308	108,725,983	7,604,325
Home Centers-44411	45,901,805	17,038,247	28,863,558
Paint and Wallpaper Stores-44412	1,915,780	325,509	1,590,271
Hardware Stores-44413	7,926,610	19,578,868	(11,652,258)
Other Building Materials Dealers-44419	60,586,113	71,783,359	(11,197,246)
Building Materials, Lumberyards-444191	20,073,593	24,478,920	(4,405,327)
Lawn, Garden Equipment, Supplies Stores-4442	12,683,508	9,039,354	3,644,154
Outdoor Power Equipment Stores-44421	1,960,850	3,310	1,957,540
Nursery and Garden Centers-44422	10,722,658	9,036,044	1,686,614

Anderson PTA Retail Leakage 2 of 3

Food and Beverage Stores-445	161,005,465	144,197,846	16,807,619
Grocery Stores-4451	134,575,684	136,112,094	(1,536,410)
Supermarkets, Grocery (Ex Conv) Stores-44511	128,416,012	129,762,621	(1,346,609)
Convenience Stores-44512	6,159,672	6,349,473	(189,801)
Specialty Food Stores-4452	18,315,310	7,752,270	10,563,040
Beer, Wine and Liquor Stores-4453	8,114,471	333,482	7,780,989
Health and Personal Care Stores-446	75,075,392	73,820,785	1,254,607
Pharmancies and Drug Stores-44611	62,762,065	62,897,321	(135,256)
Cosmetics, Beauty Supplies, Perfume Stores-44612	3,175,030	2,768,594	406,436
Optical Goods Stores-44613	3,444,903	5,907,999	(2,463,096)
Other Health and Personal Care Stores-44619	5,693,394	2,246,871	3,446,523
Clothing and Clothing Accessories Stores-448	54,819,426	68,288,884	(13,469,458)
Clothing Stores-4481	39,589,197	49,334,387	(9,745,190)
Men's Clothing Stores-44811	4,224,477	3,183,264	1,041,213
Women's Clothing Stores-44812	11,684,596	15,075,407	(3,390,811)
Childrens, Infants Clothing Stores-44813	1,963,271	259,173	1,704,098
Family Clothing Stores-44814	17,837,473	27,144,303	(9,306,830)
Clothing Accessories Stores-44815	907,952	791,183	116,769
Other Clothing Stores-44819	2,971,428	2,881,057	90,371
Shoe Stores-4482	7,980,158	12,195,422	(4,215,264)
Jewelry, Luggage, Leather Goods Stores-4483	7,250,071	6,759,075	490,996
Jewelry Stores-44831	6,687,836	6,759,075	(71,239)
Luggage and Leather Goods Stores-44832	562,235		562,235

Anderson PTA Retail Leakage 3 of 3

General Merchandise Stores-452	157,975,118	349,532,217	(191,557,099)
Department Stores Excl Leased Depts-4521	105,910,363	226,800,326	(120,889,963)
Other General Merchandise Stores-4529	52,064,755	122,731,891	(70,667,136)
Warehouse Clubs and Super Stores-45291	33,603,898	81,652,000	(48,048,102)
All Other General Merchandise Stores-45299	18,460,857	41,079,891	(22,619,034)
Miscellaneous Store Retailers-453	33,404,094	67,229,021	(33,824,927)
Florists-4531	4,025,163	1,838,013	2,187,150
Office Supplies, Stationery, Gift Stores-4532	13,867,686	27,654,589	(13,786,903)
Office Supplies and Stationery Stores-45321	6,066,613	16,389,004	(10,322,391)
Gift, Novelty and Souvenir Stores-45322	7,801,073	11,265,585	(3,464,512)
Used Merchandise Stores-4533	3,204,944	3,427,175	(222,231)
Other Miscellaneous Store Retailers-4539	12,306,301	34,309,244	(22,002,943)
Foodservice and Drinking Places-722	127,013,420	193,615,357	(66,601,937)
Full-Service Restaurants-7221	52,342,287	57,107,614	(4,765,327)
Limited-Service Eating Places-7222	53,966,419	104,791,605	(50,825,186)
Special Foodservices-7223	9,637,945	3,506,110	6,131,835
Drinking Places -Alcoholic Beverages-7224	11,066,769	28,210,028	(17,143,259)
GAFO *	307,617,173	528,965,377	(221,348,204)
General Merchandise Stores-452	157,975,118	349,532,217	(191,557,099)
Clothing and Clothing Accessories Stores-448	54,819,426	68,288,884	(13,469,458)
Furniture and Home Furnishings Stores-442	31,174,109	24,366,044	6,808,065
Electronics and Appliance Stores-443	28,025,503	31,338,698	(3,313,195)
Sporting Goods, Hobby, Book, Music Stores-451	21,755,331	27,784,945	(6,029,614)
Office Supplies, Stationery, Gift Stores-4532	13,867,686	27,654,589	(13,786,903)

Anderson STA Retail Leakage 1 of 3

	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	443,373,632	327,521,710	115,851,922
Furniture and Home Furnishings Stores-442	16,566,796	10,984,251	5,582,545
Furniture Stores-4421	9,150,331	8,944,346	205,985
Home Furnishing Stores-4422	7,416,465	2,039,905	5,376,560
Electronics and Appliance Stores-443	14,501,245	2,339,122	12,162,123
Appliances, TVs, Electronics Stores-44311	9,461,905	2,251,460	7,210,445
Household Appliances Stores-443111	1,805,579	1,680,314	125,265
Radio, Television, Electronics Stores-443112	7,656,326	571,146	7,085,180
Computer and Software Stores-44312	4,548,845	87,662	4,461,183
Camera and Photographic Equipment Stores-44313	490,495		490,495
Building Material, Garden Equip Stores -444	72,916,021	93,911,903	(20,995,882)
Building Material and Supply Dealers-4441	65,975,801	87,133,666	(21,157,865)
Home Centers-44411	25,726,716	77,827,588	(52,100,872)
Paint and Wallpaper Stores-44412	1,052,430	106,495	945,935
Hardware Stores-44413	4,420,840	3,458,974	961,866
Other Building Materials Dealers-44419	34,775,815	5,740,609	29,035,206
Building Materials, Lumberyards-444191	11,260,075	1,957,610	9,302,465
Lawn, Garden Equipment, Supplies Stores-4442	6,940,220	6,778,237	161,983
Outdoor Power Equipment Stores-44421	1,102,219	1,468	1,100,751
Nursery and Garden Centers-44422	5,838,001	6,776,769	(938,768)

Anderson STA Retail Leakage 2 of 3

Food and Beverage Stores-445	88,758,623	69,105,202	19,653,421
Grocery Stores-4451	74,376,703	67,697,247	6,679,456
Supermarkets, Grocery (Ex Conv) Stores-44511	70,940,171	64,767,717	6,172,454
Convenience Stores-44512	3,436,532	2,929,530	507,002
Specialty Food Stores-4452	10,080,935	1,355,046	8,725,889
Beer, Wine and Liquor Stores-4453	4,300,985	52,909	4,248,076
Health and Personal Care Stores-446	40,411,030	15,680,802	24,730,228
Pharmancies and Drug Stores-44611	33,850,531	15,477,805	18,372,726
Cosmetics, Beauty Supplies, Perfume Stores-44612	1,705,882	125,863	1,580,019
Optical Goods Stores-44613	1,787,496		1,787,496
Other Health and Personal Care Stores-44619	3,067,121	77,134	2,989,987
Clothing and Clothing Accessories Stores-448	28,297,885	2,638,914	25,658,971
Clothing Stores-4481	20,618,831	1,468,717	19,150,114
Men's Clothing Stores-44811	2,225,622	298,673	1,926,949
Women's Clothing Stores-44812	6,020,559	799,927	5,220,632
Childrens, Infants Clothing Stores-44813	1,043,827	51,832	991,995
Family Clothing Stores-44814	9,330,874	21,069	9,309,805
Clothing Accessories Stores-44815	452,559		452,559
Other Clothing Stores-44819	1,545,390	297,216	1,248,174
Shoe Stores-4482	4,222,682	111,574	4,111,108
Jewelry, Luggage, Leather Goods Stores-4483	3,456,372	1,058,623	2,397,749
Jewelry Stores-44831	3,173,300	851,624	2,321,676
Luggage and Leather Goods Stores-44832	283,072	206,999	76,073
Sporting Goods, Hobby, Book, Music Stores-451	11,226,758	4,851,474	6,375,284
Sportng Goods, Hobby, Musical Inst Stores-4511	8,047,442	3,257,515	4,789,927
Sporting Goods Stores-45111	4,011,787	945,225	3,066,562
Hobby, Toys and Games Stores-45112	2,687,244	2,007,330	679,914
Sew/Needlework/Piece Goods Stores-45113	731,628	26,961	704,667
Musical Instrument and Supplies Stores-45114	616,783	277,999	338,784
Book, Periodical and Music Stores-4512	3,179,316	1,593,959	1,585,357
Book Stores and News Dealers-45121	1,981,884	170,637	1,811,247
Book Stores-451211	1,798,431	55,004	1,743,427
News Dealers and Newsstands-451212	183,453	115,633	67,820
Prerecorded Tapes, CDs, Record Stores-45122	1,197,432	1,423,322	(225,890)

Anderson STA Retail Leakage 3 of 3

General Merchandise Stores-452	84,633,950	37,350,810	47,283,140
Department Stores Excl Leased Depts-4521	56,313,738	28,047,401	28,266,337
Other General Merchandise Stores-4529	28,320,212	9,303,409	19,016,803
Warehouse Clubs and Super Stores-45291	18,393,097	33,495	18,359,602
All Other General Merchandise Stores-45299	9,927,115	9,269,914	657,201
Miscellaneous Store Retailers-453	18,313,908	40,041,845	(21,727,937)
Florists-4531	2,173,138	337,320	1,835,818
Office Supplies, Stationery, Gift Stores-4532	7,502,838	2,013,951	5,488,887
Office Supplies and Stationery Stores-45321	3,277,671		3,277,671
Gift, Novelty and Souvenir Stores-45322	4,225,167	2,013,951	2,211,216
Used Merchandise Stores-4533	1,692,670	1,744,091	(51,421)
Other Miscellaneous Store Retailers-4539	6,945,262	35,946,483	(29,001,221)
Foodservice and Drinking Places-722	67,747,416	50,617,387	17,130,029
Full-Service Restaurants-7221	27,899,558	21,067,887	6,831,671
Limited-Service Eating Places-7222	28,890,987	22,261,101	6,629,886
Special Foodservices-7223	5,161,550	2,388,286	2,773,264
Drinking Places -Alcoholic Beverages-7224	5,795,321	4,900,113	895,208
GAFO *	162,729,472	60,178,522	102,550,950
General Merchandise Stores-452	84,633,950	37,350,810	47,283,140
Clothing and Clothing Accessories Stores-448	28,297,885	2,638,914	25,658,971
Furniture and Home Furnishings Stores-442	16,566,796	10,984,251	5,582,545
Electronics and Appliance Stores-443	14,501,245	2,339,122	12,162,123
Sporting Goods, Hobby, Book, Music Stores-451	11,226,758	4,851,474	6,375,284
Office Supplies, Stationery, Gift Stores-4532	7,502,838	2,013,951	5,488,887

Retail Shares

Total Retail Sales Incl Eating and Drinking Places	3.3%
Furniture and Home Furnishings Stores-442	30.9%
Cosmetics, Beauty Supplies, Perfume Stores-44612	16.3%
Men's Clothing Stores-44811	32.1%
Clothing Accessories Stores-44815	26.2%
Jewelry Stores-44831	14.0%
Used Merchandise Stores-4533	11.6%
Full-Service Restaurants-7221	1.6%

Key Retail Opportunities

- *Home furnishings*
- *Specialty foods*
- *Health stores (food supplements, etc)*
- *Men's and Children's Clothing*
- *Catering*
- *Fine dining*
- *Used merchandise*

Concluding Thoughts

- *Downtown is not performing as well as a retail destination as other parts of Anderson.*
- *Downtown should expand its regional positioning to capture an expanded market.*
- *Downtown should cultivate local customer loyalty and move away from convenience retail to destination retail.*
- *There are certain key opportunities for allied retail to expand in downtown that are emerging.*

Next Steps

- *Development of marketing strategy to include:*
 - *Wayfinding*
 - *Mock ads to retain local customers and instill local pride*
 - *Recruitment tactical pieces*
 - *Other*
- *Development of implementation strategy with:*
 - *Clearly stated goals and objectives*
 - *Implementation time frames: short, medium, long-term*
 - *Responsible parties*