Draft

FEBRUARY 2, 2015

STRATEGIC DIRECTION MEMORANDUM

DOWNTOWN O'FALLON AREA PLAN

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BDI

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Executive Summary

The City of O'Fallon retained Business Districts, Inc., (BDI) in October 2014 to conduct a market-based plan to improve the Downtown O'Fallon area. As Figure 1 illustrates, this Strategic Direction Memorandum is approximately the halfway point in this project. It summarizes the completed market research and provides a vision statement to guide future Downtown improvement efforts. Once there is agreement on this Strategic Direction, an Action Plan will be created to achieve the vision. That Action Plan will provide accountability through specific guidance on the tasks that will achieve the objectives along with due dates and budgets.

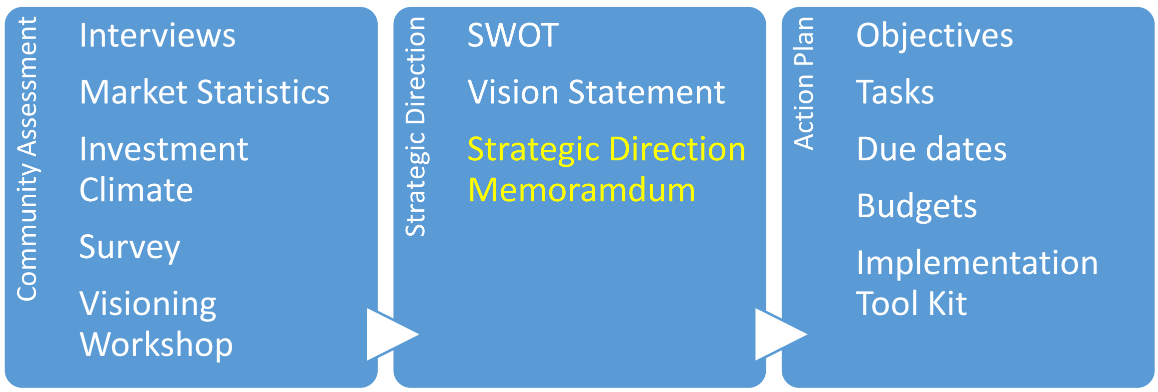

Figure 1: Project Scope

In O'Fallon, an attractive downtown with strong businesses may be most important for one key reason—as a source of community identity. The vision for that identity is summarized as:

Downtown O'Fallon will be a memorable and cherished place providing an active, walkable, mixed use district with unique community activities and commerce and offering O'Fallon residents and visitors a superior place to live, shop, dine, work, and interact.

The balance of this report provides details supporting these key findings:

- The market for the Downtown O'Fallon area is larger than the city's municipal boundaries.
- There is more than $3 billion in retail spending power within Downtown O'Fallon's destination market.
- Because there is competition in the market, success is driven by the quality of the shopping experience. It is not primarily what businesses offer but how they deliver their products.
- There were more than 1,100 responses to the community survey, and it yielded valuable information, including:
    - Existing restaurants should be optimistic because the majority of respondents indicated they would spend more in all types of restaurants except quick serve.
    - Building, sidewalk and lighting attractiveness, along with bicycle and pedestrian access had such low ratings that they must impact the competitiveness of Downtown O'Fallon businesses.
    - Existing businesses can improve sales by adopting desired formats and stocking requested items or, if already in stock, advertising the item's availability.

    - When respondents were asked whether they would attend Downtown O'Fallon events, approximately 90% of respondents confirmed an interest in food centered events. Such as a food festival, farmer's market, and restaurant tastings.

- O'Fallon's desire to improve its downtown district will require commitment to an organizational structure that will assume ownership for downtown's improvements through programming.

Strategic Direction Recommendations

As O'Fallon continues to grow, new and current residents, having high incomes and being well educated, are attracted by O'Fallon's great schools and many other amenities. Commercial developers are actively interested in O'Fallon locations for varied uses—retail, employment, office, and healthcare. A healthy and vital downtown represents an important amenity for O'Fallon's many investors. Through programming and activities, a healthy downtown can unite locals around the idea that O'Fallon is a great place to live and do business. The Downtown Plan aims both to strengthen the activities and features that have made the downtown a memorable, special place, while also encouraging changes in those activities and features that may undermine the sustainability of the Downtown O'Fallon area.

This strategic direction provides a foundation for improvements to realize Downtown O'Fallon's full potential. To realize the Downtown Vision, the community must undertake actionable steps that achieve objectives listed below. Through community response to this Strategic Direction Memorandum and the input of parking and design consultants these objectives could be modified and additional objectives could be added. During the next project phase, Action Planning, the tasks, budgets and entity responsible for achieving each objective will be detailed.

Objectives

Framework

- Develop a public private partnership that shares responsibility for organizing, programming, and funding management of programming in O'Fallon's Downtown.
- Improve the public Infrastructure
    - Festival space
    - Parking
    - City Market
    - Plazas
    - Bike lanes
    - Lighting
    - Pedestrian access
- Support business development
    - Create programs to share costs related to parking lot paving and façade improvements
    - Partner with the Chamber in programing to improve business profitability
- Define a workable mixed-use balance
    - Seek modern office that brings a daytime population
    - Encourage top quality residential improvements

Promotion

- Create marketing materials to define investment opportunities
    - One page highlight sheets on redevelopment opportunities
    - Press releases for regional real estate publications
- Launch three signature events
    - Follow survey interest in food oriented events
    - Evaluate past events to identify strongest
- Coordinate a Web based event and business marketing program
    - Assist businesses in using the Internet to market
    - Launch City-wide business communication program
- Identify temporary tenant programs that improve existing businesses and grow new businesses
    - Test new concepts
    - Launch resident businesses

Funding

- Create five-year budget for City funded capital improvements
- Identify private financial resources
    - Bank loans
    - Non-profit support
- Create incentive guidelines
    - Existing Downtown businesses
    - New downtown businesses

Market Information

Downtown O'Fallon is not an economic island, rather, it belongs to a large and complex region with competitive commercial environments. The characteristics that drive the regional economy, (transportation accessibility, skilled workers, Scott Air Force Base, and agglomeration of industries) create jobs and in turn create a demand for workers and homes for those workers. These developments filter down to O'Fallon as it competes against neighboring communities. Because Downtown O'Fallon's commercial experience mixes residential units, financial services, recreation, stores, and restaurants, it appeals to a variety of markets. Although each business in Downtown O' Fallon develops its own market, there are four markets that the combination of businesses must capture. These markets are:

- Community Affiliated Market: Downtown O'Fallon is an element of the community's character. With pride, residents bring guests to dine in independent restaurants and seek special items at unique stores. It is as a setting for community events that draw residents and the location of City Hall where resident business is conducted. This relationship creates an affiliation that makes community residents an important market for the Downtown O'Fallon enterprises.
- Pedestrian Market (Figure 2): Residents living within one-half mile of Downtown O'Fallon should be particularly intense users. The frequent trips and presence of these nearby residents adds vitality even when businesses are not open and therefore this market is more important to Downtown's success than its spending power suggests. The size and condition of homes in this market influences the image of Downtown. Neighborhood infrastructure enhancement, new development, and new businesses attracted to this area have the power to transform Downtown O'Fallon.

Figure 2: Pedestrian Market

- Convenience Market (Figure 3): If one can drive to obtain needed items within five-minutes, that location can be the routine choice to meet every day needs. Traditionally, these convenience shoppers were the primary market for both downtowns and neighborhood retail clusters such as Southview Plaza. Although much of that purchasing power has shifted to power center clusters near the Interstate, this convenience market still must provide 50% to 85% of the spending captured by Downtown O'Fallon businesses. That high sales percentage reflects downtown businesses' role as an amenity where residents develop relationships with business proprietors and quickly obtain a range of necessities such as haircuts, exercise classes, auto service, and take-out meals. Downtown O'Fallon's five-minute drive time market also identifies the homes of bicyclists who can pedal to stores and restaurants in ten-minutes or less. Increasingly, that activity adds recreational users to the convenience mix.

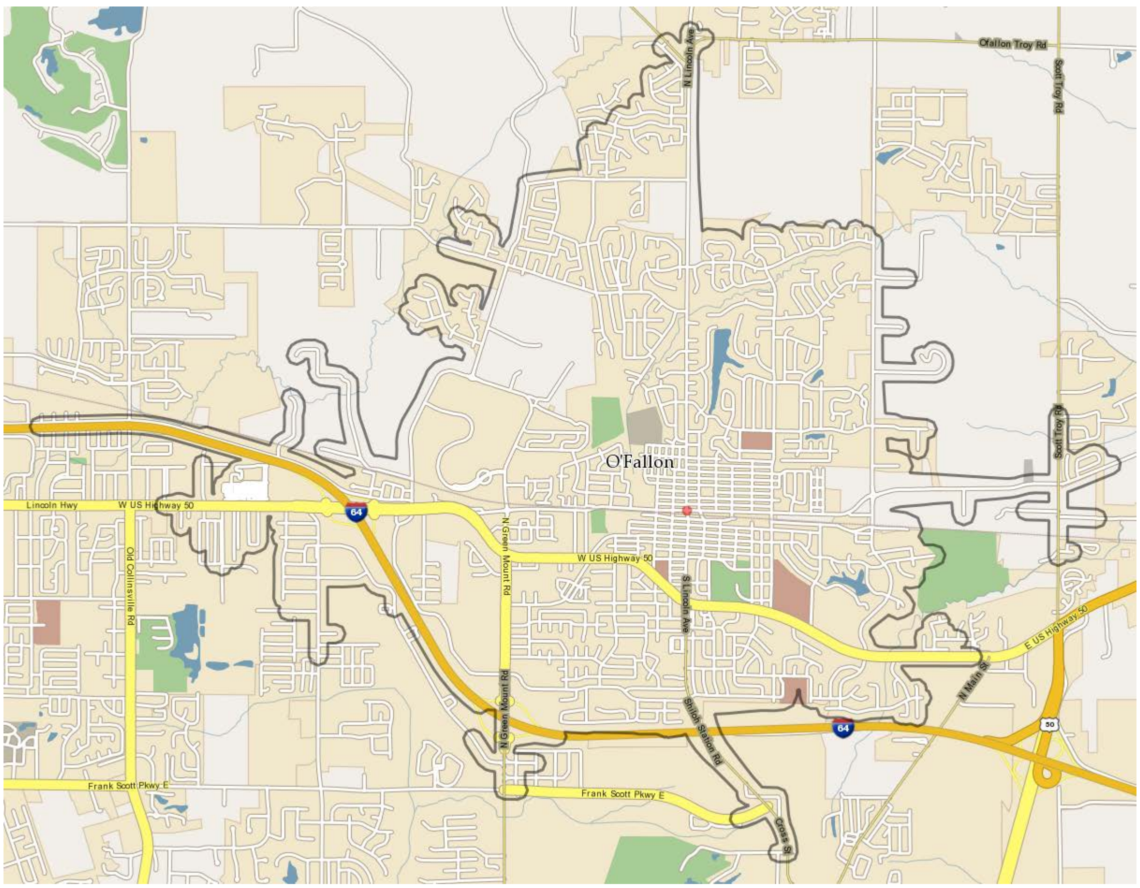

Figure 3: Convenience Market

- Destination Market (Figure 4): This geography encompasses all of the markets served by businesses in Downtown O'Fallon. The businesses unable to sustain their operation from sales to the closer markets must create a destination draw, as their unique offering attracts visitors from a larger geography. Interviews with local businesses and input from O'Fallon Community development staff led to the creation of the custom market depicted in Figure 3. This custom market expands the more typical 20-minute drive time destination market to include customers from rural areas to the east of Downtown O'Fallon where unique shopping and dining options are limited. This destination market both supplies customers to Downtown O'Fallon's destination businesses and adds sales to adjacent convenience businesses. Destination businesses such as, Steven Mueller Florist, Peel Pizza, and Luckenbooth, attract this market and also give the commercial cluster a unique character that differentiates it from other shopping alternatives. It is important to note that, although the sales volume from destination customers is a smaller percent of the downtown's total volume than sales from the convenience market, these marginal sales add significantly to the profits of all businesses and, without destination customers, even convenience businesses probably cannot meet their sales goals.

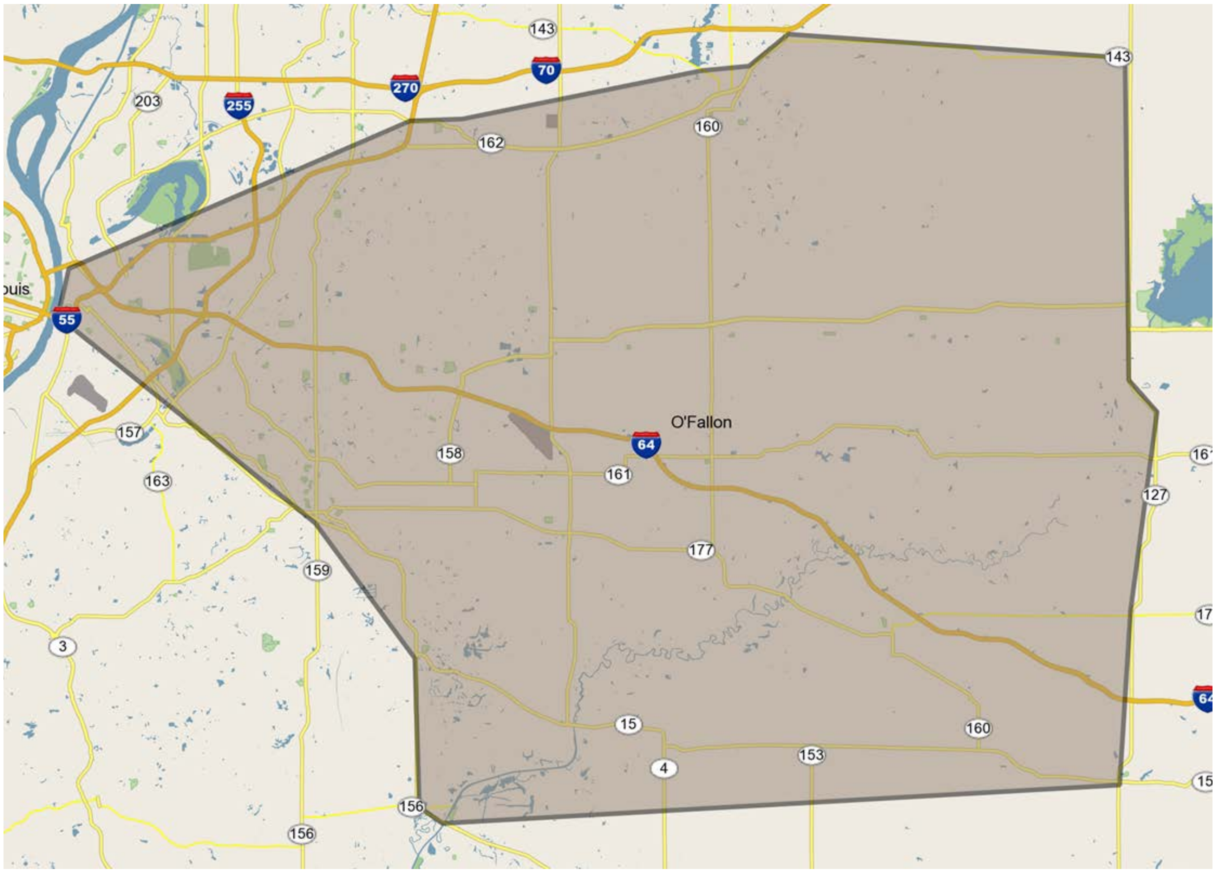

Figure 4: Destination Market

The optimal business mix in Downtown O'Fallon will balance the appeal to all four markets. To understand this mix, it is useful to consider national research that queried a balanced sample of 500 customers to understand the maximum time they would spend it a car to obtain different categories of goods. Figure 5 reports that research documenting how the category of good influences how far customers will travel. This research is important because it verifies that a shopping district like Downtown O'Fallon must connect to the local and destination markets. Through operation excellence and the underserved rural population to the east, it is expected that Downtown O'Fallon's unique stores and restaurants may attract shopper from an even greater distance than this national standard.

Figure 5: Drive times by business category

Demographics and Market Economics

As businesses in Downtown O'Fallon seek customers from the available markets, it is important to understand the potential sales that are available from those markets. Table 1, below, documents the populations in Downtown O'Fallon's key markets and their spending power. Appendix 1 provides more detailed demographic information and information on spending power by business category.

Table 1

	O'Fallon	Pedestrian (Figure 1)	Convenience (Figure 2)	Destination (Figure 3)
Total Population	29,149	2,810	19,682	298,438
Employees	11,034	1,238	7,245	N/A
Jobs per Household	0.8	1.0	0.9	N/A
Median Age	37.9	38.3	38.1	37.7
New Millenials	18.4%	20.8%	18.8%	20.0%
Average Household Income	$89,934	$84,552	$87,819	$68,969
Median Household Income	$70,235	$65,441	$69,229	$54,437
Renter Occupied Housing	31.3%	33.9%	32.4%	32.5%
Total Annual Retail Demand	$254,730,691	$27,541,708	$180,791,191	$3,014,238,265
Annual Restaurant Demand	$34,814,874	$3,738,837	$24,605,988	$314,223,901
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As Downtown O'Fallon property owners seek new tenants, this information confirms the market strength and the approach that tenants must take to be successful. Based on the data "Annual Restaurant Demand,", a new restaurant that seeks $1 million in annual sales, would need to attract much less than 1% of the spending within Downtown O'Fallon's destination market. ($1 million/ $314 Million = 0.32%) However, to attract that market, the new restaurant will need to advertise to the destination customers' geography. If that marketing is not done, the business will likely only reach the local market and need a 4% market capture. ($1 million/ $25 Million = 4%)

Market Summary

It is not municipal boundaries but rather accessibility that determines the size of the Downtown O'Fallon market. With more than $3 billion in retail spending power within its destination market, Downtown O'Fallon is centered on a substantial but very competitive market. Under these conditions, success is driven by the quality of the shopping experience. What businesses offer can and should change over time, but the high quality of the experience that they deliver must be constant. It is the intention of this project to identify the current Downtown O'Fallon experiences and elements that must change to improve the Downtown O'Fallon area.

Consumer Behavior Survey

The consumer behavior survey was a tool used to understand residents' current shopping behaviors and opinions about the Downtown O'Fallon area. The survey element of the market research solicited specific data and feedback on community use and satisfaction with the existing character of Downtown O'Fallon. The survey presented an opportunity to learn which businesses, investments, and policies would attract a larger share of residents' time and dollars to the Downtown O'Fallon area.

Survey Design

From October 21, 2014 through November 27, 2014, the web-based survey was accessible through respondents' computers and cell phones. The City of O'Fallon promoted the survey via e-blasts, its website, water billings, and business cards provided to the Chamber of Commerce and Downtown businesses.

The survey was composed of 21 questions and took approximately 10-minutes to answer. Seventeen of the questions were multiple-choice. The remaining questions were short answer questions asking respondents to list restaurants and stores they had visited and thought would be good additions to Downtown O'Fallon. A summary question included a field where respondents were asked to give any additional comments. The final question asked respondents to provide their name and e-mail address so they could learn the results of the survey and assist in efforts to improve the Downtown O'Fallon area.

1,104 surveys were completed, and an initiative inviting O'Fallon Township High School to answer survey questions generated another 203 responses. Just when the survey was closing, a new business, Peel Pizza, opened in Downtown O'Fallon and appeared to change the parking dynamic. To investigate that impression, survey respondents who provided e-mail addresses, City e-blast participants, website visitors, and attendees at the Visioning Workshop were given the chance to answer a follow-up parking survey. That survey was open from December 11, 2014 through January 9, 2015. There were 343 responses to that survey.

In calculating percentages of respondents' satisfaction or inclination to spend, "I don't know" answers were removed from the totals before rankings were created. This adjustment eliminated any potential misinterpretation that might arise when an unusually high number of "I don't know" answers reduced the other response percentages.

The analysis that follows highlights survey results that inform the planning process. The survey also provides a basis for future program analysis and can support additional research (primarily involving focus groups). Focus groups composed of individuals who provided specific answers can be created by using the respondent's e-mail addresses given as a reply to Question 21. After implementation progress the City can repeat survey question to learn whether respondents saw improvement. The appendix provides the complete survey results.

Survey Response Findings

Current Perceptions

In examining quality perceptions, it is important to recognize that, for characteristics such as traffic flow and parking, being average means being equal to competing shopping options. Since those characteristics support rather than determine the experience of visiting the area, investments to improve these characteristics generally don't increase vitality. Excellent and above average ratings for other characteristics, for example cleanliness, attractiveness, and bicycle access, can increase visits by improving the quality of the visit experience.

As Table 2 highlights, the traffic flow in Downtown O'Fallon is not deterring three quarters of the respondents from visiting. Because a third of respondents rated parking below average, parking warrants close attention and is the subject of a parking consultant's study. To assist that effort there was a supplementary parking survey seeking additional details on the Downtown O'Fallon parking experience. (See next section of this report)

Table 2

Rate your overall satisfaction with these factors as they apply to Downtown O'Fallon:	
Answered at least average	
Traffic flow	74.7%
Parking convenience	65.2%

The building attractiveness, bicycle access, sidewalk and lighting attractiveness, and pedestrian access had such low ratings that one can conclude they must impact the competitiveness of Downtown O'Fallon businesses. These results verify the need for O'Fallon's Downtown Plan to guide appearance, tenanting, and access improvements because improving the perception of those characteristics will increase Downtown O'Fallon visits. It is important to note that general safety, largely controlled by the City, was highly rated. This result is important because correcting low perception of safety is very expensive and difficult.

Table 3

Rate your overall satisfaction with these factors as they apply to Downtown O'Fallon:	
Answered at least above average	
General safety	61.5%
Cleanliness of streets and sidewalks	51.6%
Pedestrian safety	38.7%
Pedestrian access	36.8%
Sidewalks and lighting attractiveness	31.7%
Bicycle access	21.7%
Building attractiveness	15.9%

Special Parking Survey

As mentioned above, a new businesses, Peel Pizza, opened in Downtown O'Fallon and changed the parking dynamic. To investigate that change, a follow-up parking survey was conducted. Concurrently, the City has undertaken steps to improve signage and add short-term spaces. Figures 5, 6 and 7 illustrate the results of this additional parking query.

These results seem to imply that Downtown O'Fallon parking remains within acceptable limits. 71% of respondents are finding parking one block or closer to their destination and their search takes less than five-minutes. The City continues to monitor this issue as Downtown planning progresses.

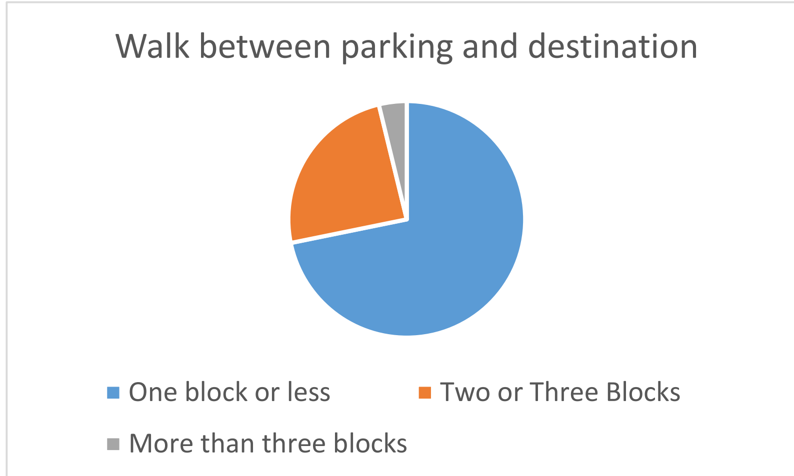


Figure 6

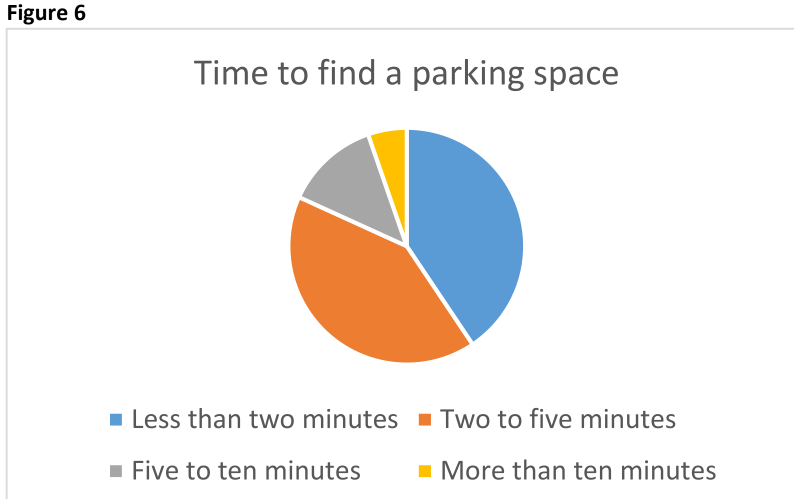


Figure 7

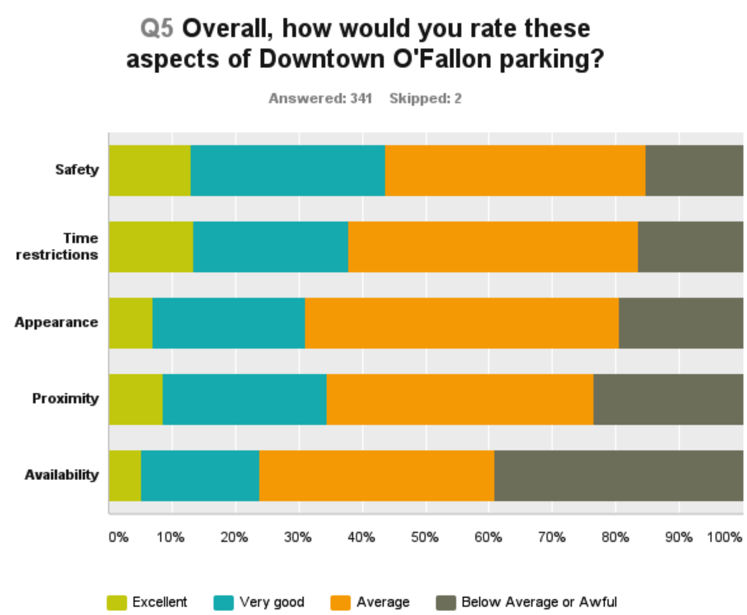


Figure 8

Current Utilization

To help identify the baseline utilization of Downtown O'Fallon, the survey asked about respondents' reasons for visiting Downtown O'Fallon (Table 4) and about recent visits to competing shopping districts (Tables 5 and 6). The answers, detailed below, reveal that the respondents-- a group that probably is more interested in Downtown O'Fallon than is the general population given that they took the time to complete this survey—dine in Downtown O'Fallon more frequently than they shop there. Neither use attracts more frequent visits than nearby, national chain dominated shopping clusters. Because shopping frequency is driven by necessities such as groceries, the absence of that store category impacts the shopping frequency responses. The high Internet shopping occurrence confirms that O'Fallon consumers are following national trends. Low Edwardsville purchase frequency suggests that it is a separate market. (Tables 5 and 6) Therefore, Edwardsville-based businesses that choose to open a second location in Downtown O'Fallon would find new customers. The recent success of Peel Pizza seems to confirm that finding.

Table 4

From the list below, select the reasons for your trips during the past year to Downtown O'Fallon. (Select all that apply)	
Dining	76.9%
Community Festivals and Events	50.8%
Shopping	44.4%
City Hall	33.1%
Banking	25.4%
Exercise/Recreation	20.8%
Bicycling	13.8%
Work/Employment	13.4%
Church	9.3%

Table 5

How often do you make a purchase in these commercial areas?	
Answered at least monthly	
Fairview Heights	91.7%
Green Mount Road/Central Park Drive Area	91.2%
Online	78.4%
Downtown O'Fallon	53.3%
Missouri side of river	46.4%
Belleville	32.4%
Edwardsville	10.3%

Table 6

How often do you eat out in these commercial areas?	
Answered at least monthly	
Green Mount Road/Central Park Drive Area	85.9%
Fairview Heights	77.0%
Downtown O'Fallon	61.0%
Missouri side of river	44.7%
Belleville	28.2%
Edwardsville	13.8%

Aspirations for the future

The survey sought to guide this planning effort and the current property owners' recruitment focus with questions about what changes were most likely to increase bicycle and pedestrian visits to Downtown O'Fallon and what new businesses were most likely to increase the respondents' spending in Downtown O'Fallon.

The 55% of respondents who live close enough to walk into Downtown O'Fallon were asked what improvements would promote walking. (Table 7) Adding plazas and more lighting were cited as most likely to increase walking. To learn how Downtown O'Fallon could attract more cyclists, the 50% of respondents who use bicycles were asked about their habits and interest in improvements. (Table 8) The results indicate that, although off-street bike paths and protected lanes are the most desired improvements, marked lanes would also increase ridership.

Table 7

How likely are you to walk to Downtown O'Fallon more often if these changes are made?			
	Very likely	Somewhat likely	No impact
Plazas	25.9%	26.1%	48.0%
More lighting	24.0%	24.6%	51.4%
Additional landscaping	19.9%	22.7%	57.4%
Benches	16.8%	23.1%	60.1%
Additional marked crosswalks	14.9%	23.3%	61.8%
Better signs identifying the route	10.2%	18.3%	71.5%

Table 8

How likely are you to increase how often you bicycle to Downtown O'Fallon if these changes are made?			
	Very likely	Somewhat likely	No impact
More off-street bicycle paths	66.5%	19.1%	14.5%
More protected bicycle lanes on streets through barriers or landscaping	57.6%	23.0%	19.4%
More marked bicycle routes on streets	48.2%	32.3%	19.6%
Wider sidewalks and wider setbacks of commercial buildings	41.9%	28.2%	29.8%
More bicycle parking at businesses	34.9%	35.5%	29.6%

Existing restaurants should be optimistic because the majority of respondents continue to indicate they would spend more in all types of restaurants except quick serve. (Table 9) The very strong response to "Casual Dining" suggests a clear recruitment focus. Note also that 50% to 60% of the market is willing to spend more in the White Tablecloth, Pub, and Counter Service restaurants suggests opportunities for those concepts too.

Table 9

How would the addition of these restaurants affect the amount of money you spend at businesses in Downtown O'Fallon?	
Answered "I would spend a lot or a little more"	
Casual dining (Family oriented menu with full service)	84.4%
White tablecloth restaurant (Leisurely dining, gourmet food, prices matching full service level)	60.4%
Pub (Limited food options with a focus on entertainment or sports)	51.2%
Counter service restaurant (Order at counter and employee delivers food)	50.5%
Quick service restaurant (Order and receive food at counter, drive thru service)	32.2%

There was also interest in adding stores. (Table 10) Existing businesses can best apply this survey information and improve sales by adopting desired formats and either stocking merchandise similar to what is carried by the requested stores or, if already in stock, advertising the item's availability. This response should allay fears of existing businesses that competition would cannibalize current sales levels.

Table 10

How would the addition of these stores affect the amount of money that you spend at businesses in Downtown O'Fallon?	
I would spend a lot or a little more	
Home Accessories	60.4%
Fine Wine & Spirits	58.2%
Apparel	57.6%
Gifts & Collectibles	49.5%
Books	48.3%
Bakery	43.1%
Pet Supplies	40.4%
Hardware	39.4%
Gardening Supplies	36.5%
Art/Craft/Knitting/Sewing Supplies	29.5%
Fine Art	17.9%
Bikes	17.4%
Antiques	16.4%

The strong support for home accessory, fine wine & spirits, and apparel stores can be useful information in recruitment. Existing business can seek to increase sales by offering those goods. Although "Book Store" is a top category request, few bookstores are successfully fighting the challenges presented by e-books and online sellers; however, hybrid beverage/used book stores are doing very well when they sponsor book clubs and children's reading circles. A Downtown O'Fallon business could examine creative ways to satisfy the bookstore desire, despite the tough market, by encouraging specialty focus and hybrid businesses for the bookstore category.

When respondents were asked whether they would attend events downtown, there was strong support for events of all types. Food oriented events had exceptionally strong appeal.

Table 11

How likely is it that you would attend these Downtown O'Fallon events?	
Answered "Very likely or Somewhat likely"	
Food Festival	92.0%
Farmers Market	91.2%
Downtown Restaurant Tastings	88.8%
Art Festival or Gallery Walks	72.3%
Christmas Window Display Contest	71.0%
Parades	70.4%

Survey Summary

Surveys tell researchers what respondents think, but not the reasoning behind what they think. This survey establishes a baseline for measuring how planned changes impact Downtown O'Fallon utilization. A research program would repeat the survey effort in three to five years and draw conclusions on how behaviors are changing.

Based on the survey analysis, the consultants made observations about the results, but greater insight is possible if there is further communication with survey respondents. Because the survey allowed the respondents to volunteer to assist efforts to improve the Downtown O'Fallon area, it facilitates engaging O'Fallon residents. These volunteers have already been invited to add detail to their parking evaluation. They also can be invited to focus groups, based on their survey answers, to provide more insight into why they responded as they did. Focus groups are a form of qualitative research in which a group of people are asked questions in an interactive group setting about their perceptions, opinions, beliefs, and attitudes towards a product, service, concept, or idea.

Downtown O'Fallon SWOT

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis sets strategy by identifying the key internal and external factors seen as important to achieving a business goal. Beginning the Downtown O'Fallon area planning with a SWOT analysis ensures that the recommended business development approach is soundly conceived and matches the specific opportunity that the Downtown presents. This process examines internal factors – the strengths and weaknesses internal to the organization and external factors – the opportunities and threats presented by the environment external to the organization

The analysis that follows began as a consultant's list presented at the Community Visioning Workshop. Workshop participants modified the initial analysis to present an accurate account of the community evaluation of the opportunities offered by the Downtown O'Fallon area.

Strengths

Positive market characteristics under local control

- Quality existing businesses
    - Strong restaurant cluster
    - Antiques and vintage cluster
    - Office cluster
    - Independent business that are locally owned
    - New business (Entrepreneurial)
    - Long-standing businesses
- Co-operating Property owners
    - Current private investment
    - City owned property
    - Local property ownership
- Good "Bones"
    - Compact, walkable size
    - City owned parking
    - Top quality Schools
    - Strong Interstate 64 exit businesses
    - Chamber of Commerce
    - City Hall
    - Stable employment at Scott Air Force base

Weaknesses

Detrimental local market characteristics

- Substandard Infrastructure
  - Railroad tracks divide
  - Substandard roads
  - Unpaved parking lots
  - Inadequate lighting
  - Poor signage and wayfinding
- Challenging business conditions
  - Deteriorating Southview Plaza
  - Absentee property ownership
  - Some deteriorating buildings and lots
  - Lack of identity
  - Imbalance of alcohol emphasizing vs. family restaurants

Opportunities

Outside market characteristics that could improve business

- National Trends
  - Declining strength of mall based specialty stores
  - Growth of shared workspace
  - Technology allowing people to do business anywhere
  - Web advertising
- Regional Initiatives
  - Potential for significant new employment in O'Fallon
  - Close proximity to St Louis
  - Top choice for companies expanding to Metro East

Threats

Outside market characteristics that could hurt business

- Rapidly changing retail business models
  - Internet retailing
  - Short leases & pop-up businesses
  - Smaller stores
  - Services with product sales
- Uncertain economy
- Better financial tools in competing locations

SWOT Summary

The SWOT analysis revealed strong local support for the Downtown O'Fallon area but it recognized that the physical environment must be improved. The outside forces are positive for Downtown growth but suggest that short-term opportunities such as festivals will be central to development.

Organizational Structure

As in other communities, O'Fallon's desire to improve its downtown district will require commitment to an organizational structure that will assume ownership for downtown's improvements through programming. Previously, O'Fallon applied the Main Street model for its downtown work, using the National Main Street Center's Four-Point Approach™ from 1995 through 2003. Since then, the not-for-profit Downtown O'Fallon Organization was formed and has conducted various downtown marketing activities. This work will be ongoing, apolitical, and incremental. It is not a "project." It will require a long-term commitment, including funding and other resources, to an identified community priority—the success of downtown as a multi-functional environment.

The best framework for implementation is an organizational structure suitable to the individual community. This organizational framework must operate as a true public-private partnership. These kinds of partnerships recognize that municipal government, including elected officials and staff, and downtown's private sector interests must work together to improve downtown. In addition to partnering with the City of O'Fallon, key local interests should be engaged in establishing and working with this management structure. These additional partners should include the O'Fallon-Shiloh Chamber, the Tourism Bureau Illinois South (TBIS), local institutions, major employers, and regional economic development entities. Focusing on areas of common interest and defining how each entity can participate in downtown's success mitigates any potential overlap or competing interests in the necessary work to improve downtown.

Multiple models exist for structuring a formal downtown public-private partnership. Three models are described below for preliminary consideration. Each of these organizational frameworks has strengths and weaknesses. In considering possible frameworks for Downtown O'Fallon, two sets of issues must be addressed: (1) funding sources to support that framework must be identified, and (2) roles and responsibilities must be clearly defined. Without committed funding, downtown efforts are severely limited in their ability to implement the necessary programs to enable downtown's success. Without a defined role, the structure cannot effectively conduct its work. Also, within any appropriate organizational framework, the engagement of downtown business leaders and property owners will be crucial.

1. *Special Service Area (SSA):* Nationally, strong public-private partnerships, reliable funding, and defined programs and services characterize successful Business Improvement District (BID) funded, downtown efforts. A SSA is Illinois' equivalent of a BID. These efforts are either primarily or exclusively funded by a self-tax, typically initiated by property owners. This self-tax is legally established by municipal or county ordinance, as prescribed by state enabling legislation. It is a real estate tax specific to a defined geography. SSAs, as defined under Illinois law, are flexible and can be used for multiple purposes, including funding a commercial district organization. Practically, these legal processes are rarely initiated without the support of the affected property owners. These owners recognize a collective benefit—providing services to the defined geography beyond local government's baseline services. This collective benefit assumes that property owners, usually of commercial properties, realize that the economic strength of surrounding real estate establishes the value of their properties. The operating structure for downtown or commercial district programming is typically organized in one of two ways. In the first option, a separate organization manages all priorities and programs, in partnership with local government. This relationship is contractual, and it defines the intended use of the

funding, the local process for the annual SSA tax levy, categories of programs based on local priorities, and financial reporting requirements, among other issues. These organizations are independent, governed by a Board comprised of SSA stakeholders, and managed by hired professional staff. In the second option, dedicated municipal staff manages the district's SSA funded budget, programs, and activities and determines the annual SSA levy as part of the municipal budget process. A separate board of property and business owners meets regularly with this dedicated staff to establish priorities and consult on programming.

2. *Dedicated municipal staff and funding:* Municipalities in Illinois and elsewhere often have a staff member exclusively dedicated to working on downtown issues. As noted above, a SSA can support the activities conducted by dedicated municipal staff, or the municipality wholly funds this work. This staff serves as a liaison between downtown property owners, downtown merchants, and City Hall. Staff develops marketing programs in conjunction with the merchants and other local groups, addresses property owner issues, and works with municipal departments to ensure a high level of service is provided to the downtown community. Most also work in tandem with municipal economic development personnel on issues related to downtown's redevelopment and business growth. These staff positions often give the downtown district an internal advocate for downtown issues. Assuming the local commitment to retaining the staff position(s) and funding their downtown activities exists, the only external issue is the potential distrust of government by certain downtown stakeholders.
3. *Hybrid approaches:* Elsewhere, communities apply a wide variety of public-private partnership approaches to improving their downtowns or traditional commercial districts. Examples include:
    - Chambers of Commerce with a downtown management function or with non-profit subsidiary focused on downtown;
    - Main Street organizations housed in local Chambers, funded by BIDs/SSAs, or operated by municipal staff;
    - BID/SSA organizations as part of or subsidiaries of local or regional economic development corporations;
    - Community Development Corporations with a downtown focus.

Clarifying the best organizational framework for O'Fallon's downtown may ultimately revolve around two fundamental questions: How does important work get done in O'Fallon? Who can or will do this work most efficiently? These factors specific to the local community impact how to focus on downtown work. In order to make Downtown a better place and real source of community pride, the community must move beyond what separates different segments of the community and focus on what unites them and create a common vision.

Two additional issues are important to these strategic considerations:

- O'Fallon's experience with formal downtown management has yielded uneven results in the past. This focus on the past needs to shift to downtown's future and how O'Fallon's downtown can become a great community asset and the City's central place. Rethinking how to best manage, fund, and activate a Downtown organization will ensure that the City and Downtown's business and property owners achieve long-term positive economic results.
- The IRS's original designation of Main Street O'Fallon as a public charity with 501(c)(3)-tax status remains in place. Whether any successor organization can maintain this status should be researched. Assuming it is permitted, this could potentially allow this new effort to raise some funds through tax-deductible contributions and engage more businesses and residents.

Appendix

Demographics

	O'Fallon	0.5 Miles: Pedestrian	5 Minutes: Convenience	Custom: Destination
Total Population	29,149	2,810	19,682	298,438
Total Households	11,034	1,197	7,702	117,384
Population Density (per Sq. Mi.)	1970.0	3570.8	2,122.1	289.5
Age:				
Age 0 - 4	5.7%	5.9%	5.6%	6.5%
Age 5 - 14	14.4%	12.1%	13.9%	13.4%
Age 15 - 19	7.5%	6.2%	7.5%	6.7%
Age 20 - 24	6.0%	6.1%	6.2%	6.6%
Age 25 - 34	12.4%	14.7%	12.6%	13.4%
Age 35 - 44	14.2%	12.9%	13.5%	12.7%
Age 45 - 54	16.9%	14.4%	16.8%	15.0%
Age 55 - 64	12.0%	12.4%	12.5%	12.3%
Age 65 - 74	6.2%	8.3%	6.6%	7.0%
Age 75 - 84	3.1%	4.8%	3.2%	4.4%
Age 85 +	1.0%	1.6%	1.0%	1.9%
Median Age	37.9	38.3	38.1	37.7
Housing Units by Tenure				
Owner Occupied Housing Units	7,572	790	7,702	79,181
Owner Occupied free and clear	14.2%	17.6%	14.30%	21.2%
Owner Occupied with a mortgage or loan	54.3%	48.3%	53.10%	46.3%
Renter Occupied Housing Units	31.3%	33.9%	32.40%	32.5%
Race and Ethnicity				
American Indian, Eskimo, Aleut	0.2%	0.2%	0.2%	0.3%
Asian	2.7%	1.9%	2.7%	1.4%
Black	15.7%	13.5%	16.5%	22.9%
White	76.9%	80.3%	76.2%	71.8%
Other	0.9%	0.6%	0.8%	1.3%
Multi-Race	3.1%	3.2%	3.1%	2.3%
Hispanic Ethnicity	3.8%	3.1%	3.5%	3.9%
Not of Hispanic Ethnicity	96.1%	96.8%	96.4%	96.1%
Marital Status:				
Age 15 + Population	23,249	2,299	15,824	238,962
Divorced	8.9%	9.0%	8.50%	11.1%
Never Married	29.5%	31.0%	30.50%	31.7%
Now Married	56.4%	52.3%	55.70%	46.8%
Now Married - Separated	1.5%	1.4%	1.70%	4.0%
Widowed	4.9%	7.5%	5.10%	6.4%

	O'Fallon	0.5 Miles: Pedestrian	5 Minutes: Convenience	Custom: Destination
Educational Attainment:				
Total Population Age 25+	19,298	1,951	13,099	199,270
Grade K - 8	0.9%	1.2%	0.90%	2.7%
Grade 9 - 12	3.4%	3.2%	3.10%	6.5%
High School Graduate	17.5%	18.9%	17.30%	28.2%
Associates Degree	10.9%	10.0%	10.50%	10.2%
Bachelor's Degree	27.8%	27.5%	28.50%	16.9%
Graduate Degree	18.1%	17.4%	18.20%	9.3%
Some College, No Degree	20.8%	21.4%	21.10%	25.5%
Household Income:				
Income $0 - $15,000	6.3%	7.7%	6.3%	12.0%
Income $ 15,000 - $24,999	6.5%	7.8%	6.80%	10.7%
Income $ 25,000 - $34,999	8.5%	9.4%	8.90%	10.8%
Income $ 35,000 - $49,999	11.0%	11.4%	10.90%	12.8%
Income $ 50,000 - $74,999	21.1%	19.8%	21.10%	21.1%
Income $ 75,000 - $99,999	15.2%	15.8%	15.60%	13.6%
Income $100,000 - $124,999	12.1%	10.7%	11.90%	12.9%
Income $125,000 - $149,999	7.1%	6.3%	6.90%	6.3%
Income $150,000 +	11.6%	10.4%	11.20%	12.0%
Average Household Income	$89,934	$84,552	$87,819	$68,969
Median Household Income	$70,235	$65,441	$69,229	$54,437
Per Capita Income	$34,059	$36,026	$34,368	$27,334
Vehicles Available				
0 Vehicles Available	4.9%	6.4%	5.00%	7.4%
1 Vehicle Available	28.2%	31.0%	29.60%	33.9%
2+ Vehicles Available	66.8%	62.4%	65.30%	58.8%
Average Vehicles Per Household	2.1	1.95	2.01	1.92
Total Vehicles Available	22,104	2,346	15,538	225,765
Employees	9,020	1,238	7,245	
Establishments*	923	161	764	
Jobs/Household	0.8	1.0	0.9	

Residential Retail Spending by Category

	O'Fallon	0.5 Miles: Pedestrian	5 Minutes: Convenience	Custom: Destination
Building Material, Garden Equipment Dealers	$8,818,245	$1,007,189	$6,335,023	$84,736,414
Building Material & Supply Dealers	$7,163,088	$820,060	$5,153,499	$69,689,185
Hardware Stores	$453,903	$49,491	$322,907	$4,423,475
Home Centers	$3,880,935	$438,924	$2,782,807	$37,167,674
Other Building Materials Dealers	$2,509,050	$294,528	$1,824,008	$25,098,677
Paint and Wallpaper Stores	$319,201	$37,117	$223,777	$2,999,359
Lawn and Garden Equipment Stores	$1,655,156	$187,129	$1,181,524	$15,047,229
Nursery and Garden centers	$1,430,511	$161,350	$1,021,106	$13,042,419
Outdoor Power Equipment Stores	$224,645	$25,779	$160,418	$2,004,810
Clothing & Clothing Accessories Stores	$13,165,682	$1,392,913	$9,343,661	$119,340,539
Clothing Stores	$9,689,994	$1,031,004	$6,882,740	$88,178,816
Children's and Infants Clothing Stores	$467,899	$48,624	$325,517	$4,354,352
Clothing Accessories Stores	$335,197	$35,710	$238,076	$2,987,404
Family Clothing Stores	$5,172,550	$549,029	$3,671,989	$47,140,776
Men's Clothing Stores	$567,445	$59,494	$402,309	$5,110,516
Other Clothing Stores	$668,444	$71,724	$476,520	$6,076,326
Women's Clothing Stores	$2,478,459	$266,423	$1,768,328	$22,509,442
Jewelry, Luggage & Leather Goods Stores	$1,196,592	$127,491	$842,629	$9,667,405
Jewelry Stores	$1,074,055	$114,525	$756,773	$8,544,711
Luggage & Leather Goods Stores	$122,537	$12,966	$85,856	$1,122,694
Shoe Stores	$2,279,097	$234,418	$1,618,293	$21,494,318
Electronics & Appliance Stores	$4,550,718	$472,021	$3,182,223	$40,707,102
Appliance, Television and Electronics Stores	$3,702,221	$385,288	$2,593,727	$33,310,616
Household Appliances Stores	$1,119,178	$117,821	$791,515	$10,237,771
Radio, Television and Electronics Stores	$2,583,042	$267,467	$1,802,212	$23,072,845
Camera & Photographic Equipment Stores	$146,384	$13,813	$101,626	$1,269,084
Computer and Software Stores	$702,113	$72,920	$486,870	$6,127,402
Food & Beverage Stores	$40,780,038	$4,386,813	$29,014,866	$402,106,812
Beer, Wine, & Liquor Stores	$1,634,973	$175,681	$1,182,790	$14,392,762
Grocery Stores	$37,717,038	$4,058,165	$26,817,636	$373,530,636
Convenience Stores	$1,406,134	$153,222	$1,004,136	$13,966,855
Supermarkets and Other Grocery Stores	$36,310,904	$3,904,943	$25,813,500	$359,563,781
Specialty Food Stores	$1,428,028	$152,966	$1,014,441	$14,183,414
Foodservice & Drinking Places	$34,814,874	$3,738,837	$24,605,988	$314,223,901
Drinking Place - Alcoholic Beverages	$1,276,810	$140,136	$903,076	$11,412,973
Full-service Restaurants	$16,622,359	$1,786,703	$11,748,116	$149,927,168
Limited-service Eating Places	$16,711,292	$1,789,794	$11,810,332	$151,046,484
Special Foodservices	$204,413	$22,205	$144,464	$1,837,277

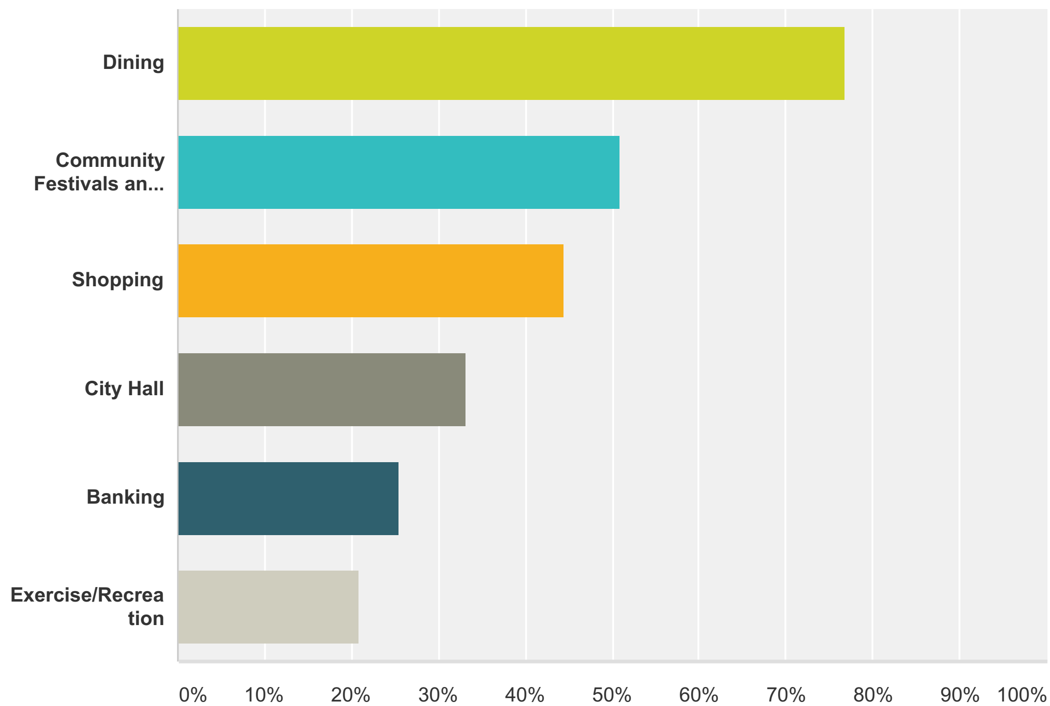
	O'Fallon	0.5 Miles: Pedestrian	5 Minutes: Convenience	Custom: Destination
Furniture & Home Furnishings Stores	$5,419,411	$583,381	$3,862,722	$51,089,884
Furniture Stores	$3,692,630	$398,509	$2,638,132	$35,074,344
Home Furnishing Stores	$1,726,782	$184,872	$1,224,590	$16,015,540
Gasoline stations	$38,037,567	$4,059,014	$27,038,030	$367,252,806
General Merchandise Stores	$34,013,071	$3,640,585	$24,075,000	$324,146,367
Department Stores excluding leased depts	$11,091,368	$1,181,910	$7,841,760	$102,801,022
Other General Merchandise Stores	$22,921,703	$2,458,675	$16,233,240	$221,345,345
Health & Personal Care Stores	$8,059,339	$889,698	$5,719,412	$78,109,762
Cosmetics, Beauty Supplies & Perfume Stores	$291,305	$32,643	$207,302	$2,865,046
Optical Goods Stores	$806,363	$82,299	$560,177	$6,772,991
Other Health and Personal Care Stores	$419,068	$46,717	$298,131	$4,132,095
Pharmacies and Drug Stores	$6,542,603	$728,039	$4,653,803	$64,339,629
Miscellaneous Store Retailers	$6,357,605	$684,232	$4,492,130	$59,540,142
Florists	$260,431	$29,609	$185,604	$2,339,772
Office Supplies, Stationery, & Gift Stores	$2,163,451	$229,074	$1,516,410	$19,765,419
Gift, Novelty, and Souvenir Stores	$918,827	$97,556	$645,091	$8,445,600
Office Supplies and Stationery Stores	$1,244,624	$131,518	$871,320	$11,319,819
Other Miscellaneous Store Retailers	$3,409,516	$370,184	$2,420,444	$32,674,504
Used Merchandise Stores	$524,206	$55,365	$369,672	$4,760,447
Motor Vehicle & Parts Dealers	$44,663,041	$4,985,958	$31,790,969	$435,622,725
Automotive Dealers	$38,686,211	$4,343,192	$27,583,981	$381,198,525
Automotive Parts, Accessories, & Tire Stores	$2,950,136	$315,495	$2,089,376	$27,666,885
Other Motor Vehicle Dealers	$3,026,694	$327,272	$2,117,613	$26,757,315
Non-store retailers	$12,323,159	$1,315,649	$8,715,759	$115,190,796
Sporting Goods, Hobby, Book, & Music Stores	$3,727,941	$385,417	$2,615,407	$33,560,851
Book, Periodical, & Music Stores	$1,443,339	$146,816	$1,009,699	$12,644,995
Book Stores and News Dealers	$1,319,356	$134,053	$923,045	$11,539,613
Book Stores	$1,251,029	$126,815	$874,912	$10,900,405
News Dealers and Newsstands	$68,327	$7,238	$48,132	$639,207
Compact Disc, and Record Stores	$123,983	$12,762	$86,654	$1,105,382
Sporting, Hobby, & Musical Instrument Stores	$2,284,602	$238,602	$1,605,709	$20,915,857
Hobby, Toys and Games Stores	$683,088	$73,023	$478,272	$6,272,460
Musical Instrument and Supplies Stores	$173,033	$17,715	$120,682	$1,524,802
Sew/Needlework/Piece Goods Stores	$193,662	$20,939	$136,009	$1,846,513
Sporting Goods Stores	$1,234,819	$126,924	$870,746	$11,272,082
Total Aggregate Annual Retail Demand	$254,730,691	$27,541,708	$180,791,191	$3,014,238,265

Interviews

Sal Cincotta (Cincotta Photography)
Brad McMillan
Brandon Case (Peel Pizza)
David Lipe (Dairy Queen)
Gary Peck (McDonalds)
Chad Holland (CR Holland Construction)
Rick Thoman (Bank of O'Fallon)
Jim Thoman (Bank of O'Fallon)
Scott Schanuel (Holland Construction)
Steven Mueller (Steven Mueller Florist)
Monica Vesera
Whitney Leidner (Refinery Salon)
Jim Schmitt (Wood Bakery)
Carlos Perez (Full Circle Auto)
Mike Smith (Hemingway's Bistro)
Kate Hendrix (Sweet Katie Bee's)
Scott Kaiser (Gia's Pizza)
Ray Holden (Ward 6)
Stephen Brown (Historic Preservation Committee)
Mark Kampen (Historic Preservation Committee)
Debbie Arell-Martinez (O'Fallon-Shiloh Chamber of Commerce)
Mark Hansen (Edward Jones)
Mike Morrill (State Farm)
Tom Mitchell (Veteran Corp)
Kim Sebella (Wolfsberger Funeral Home)
Bishop Gregory Wells (Epistolic Church)
Curt Schltknick (Schltknick Funeral Home)
Pauline McAllister (Luckenbooth Consignment)
Cara Severit (Painted Horse)
Ginger Kammler- (The Ginger Shop)
Cheryl Hill (American Legion)
Ed Martinez (VFW)
Jim Carrol (Masonic Lodge) Masonic Lodge
Sue Witter (Downtown O'Fallon)
Ned Drolet (Downtown O'Fallon)
Brian Keller (Downtown O'Fallon)

Q1 From the list below, select the reasons for your trips during the past year to Downtown O'Fallon? (Select all that apply)

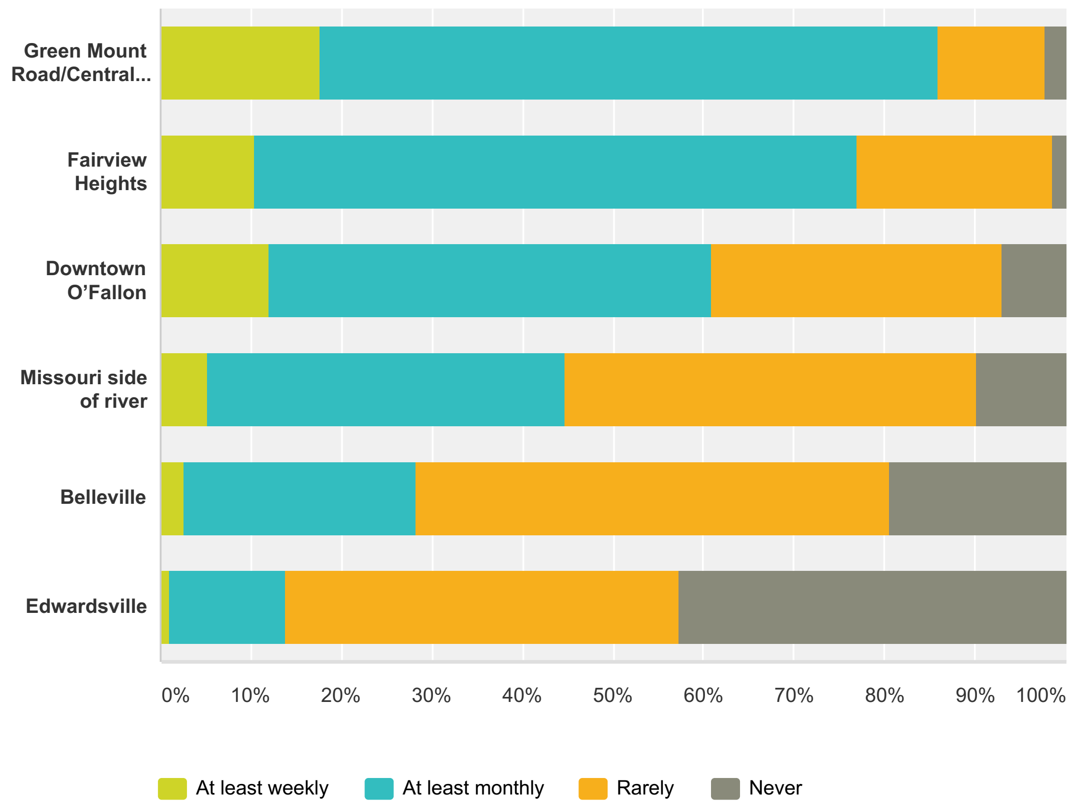
Answered: 1,072 Skipped: 32



Answer Choices	Responses	
Dining	**76.87%**	824
Community Festivals and Events	**50.84%**	545
Shopping	**44.40%**	476
City Hall	**33.12%**	355
Banking	**25.37%**	272
Exercise/Recreation	**20.80%**	223
Total Respondents: 1,072		

Q2 How often do you eat out in these commercial areas?

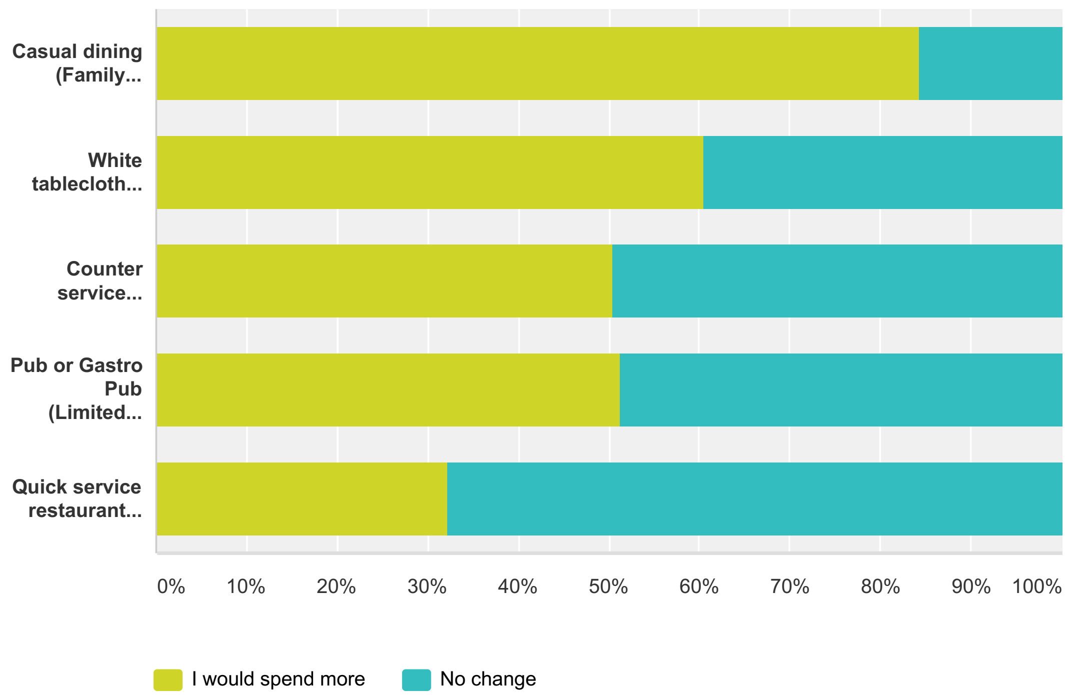
Answered: 1,031 Skipped: 73



	At least weekly	At least monthly	Rarely	Never	Total
Green Mount Road/Central Park Drive Area	**17.72%** 179	**68.22%** 689	**11.88%** 120	**2.18%** 22	1,010
Fairview Heights	**10.49%** 105	**66.53%** 666	**21.48%** 215	**1.50%** 15	1,001
Downtown O'Fallon	**11.93%** 122	**49.07%** 502	**31.96%** 327	**7.04%** 72	1,023
Missouri side of river	**5.11%** 50	**39.57%** 387	**45.40%** 444	**9.92%** 97	978
Belleville	**2.67%** 26	**25.49%** 248	**52.31%** 509	**19.53%** 190	973
Edwardsville	**1.03%** 10	**12.72%** 123	**43.64%** 422	**42.61%** 412	967

Q3 How would the addition of these restaurants affect the amount of money you spend in Downtown O'Fallon?

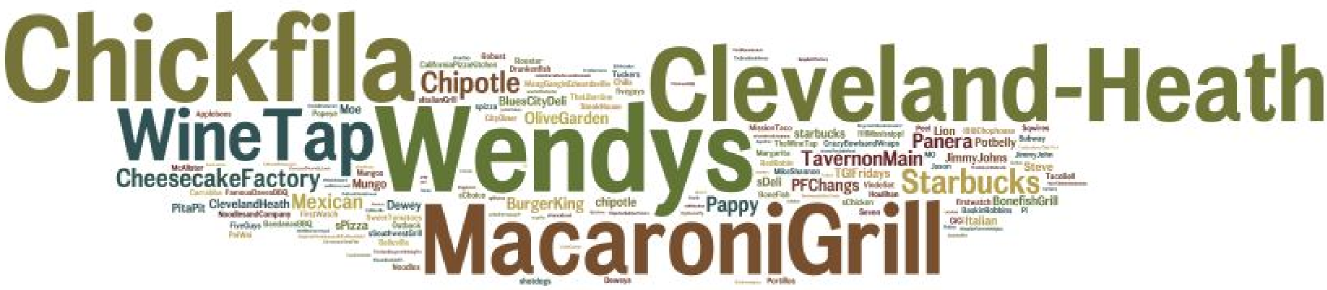
Answered: 1,029 Skipped: 75



	I would spend more	No change	Total
Casual dining (Family oriented menu with full service)	**84.38%** 843	**15.62%** 156	999
White tablecloth restaurant (Leisurely dining, gourmet food, prices matching full service level)	**60.45%** 570	**39.55%** 373	943
Counter service restaurant (Order at counter and employee brings food to the table or for carryout)	**50.47%** 486	**49.53%** 477	963
Pub or Gastro Pub (Limited food options with a focus on entertainment or sports)	**51.21%** 485	**48.79%** 462	947
Quick service restaurant (Order and receive food at counter, drive thru service)	**32.19%** 301	**67.81%** 634	935

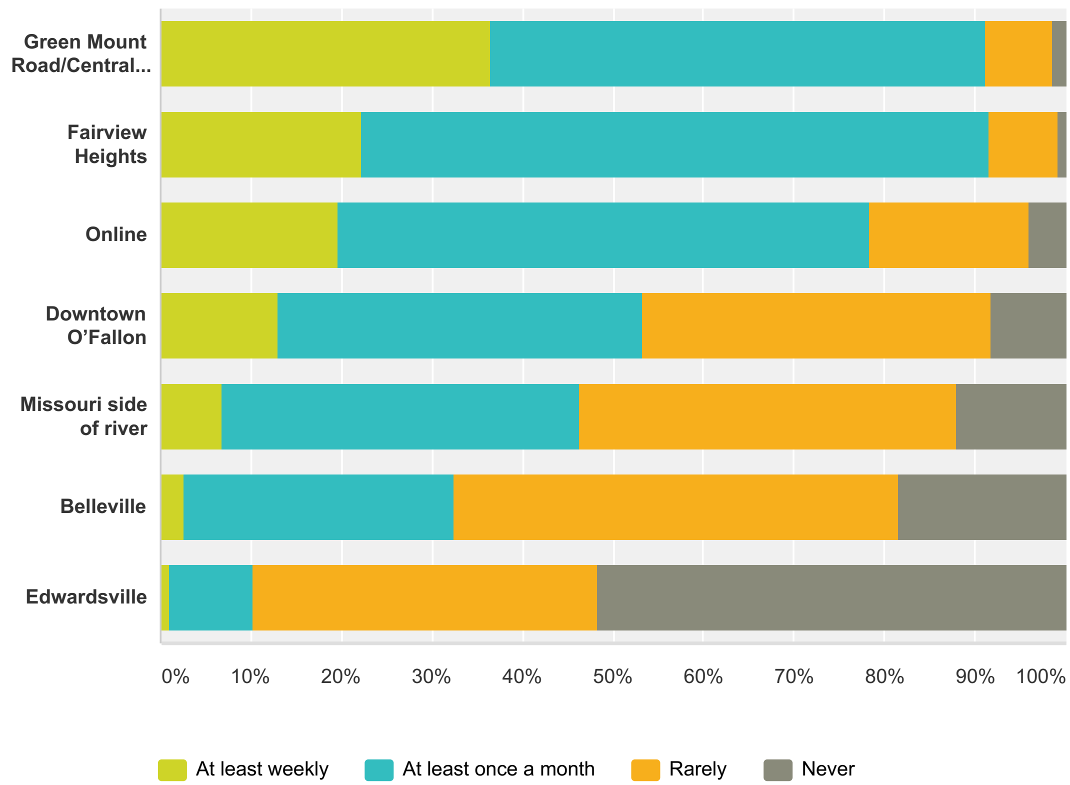
Q4 What non-O'Fallon restaurant have you visited that you think would be a good addition to Downtown O'Fallon?

Answered: 687 Skipped: 417



Q5 How often do you make a purchase in these commercial areas?

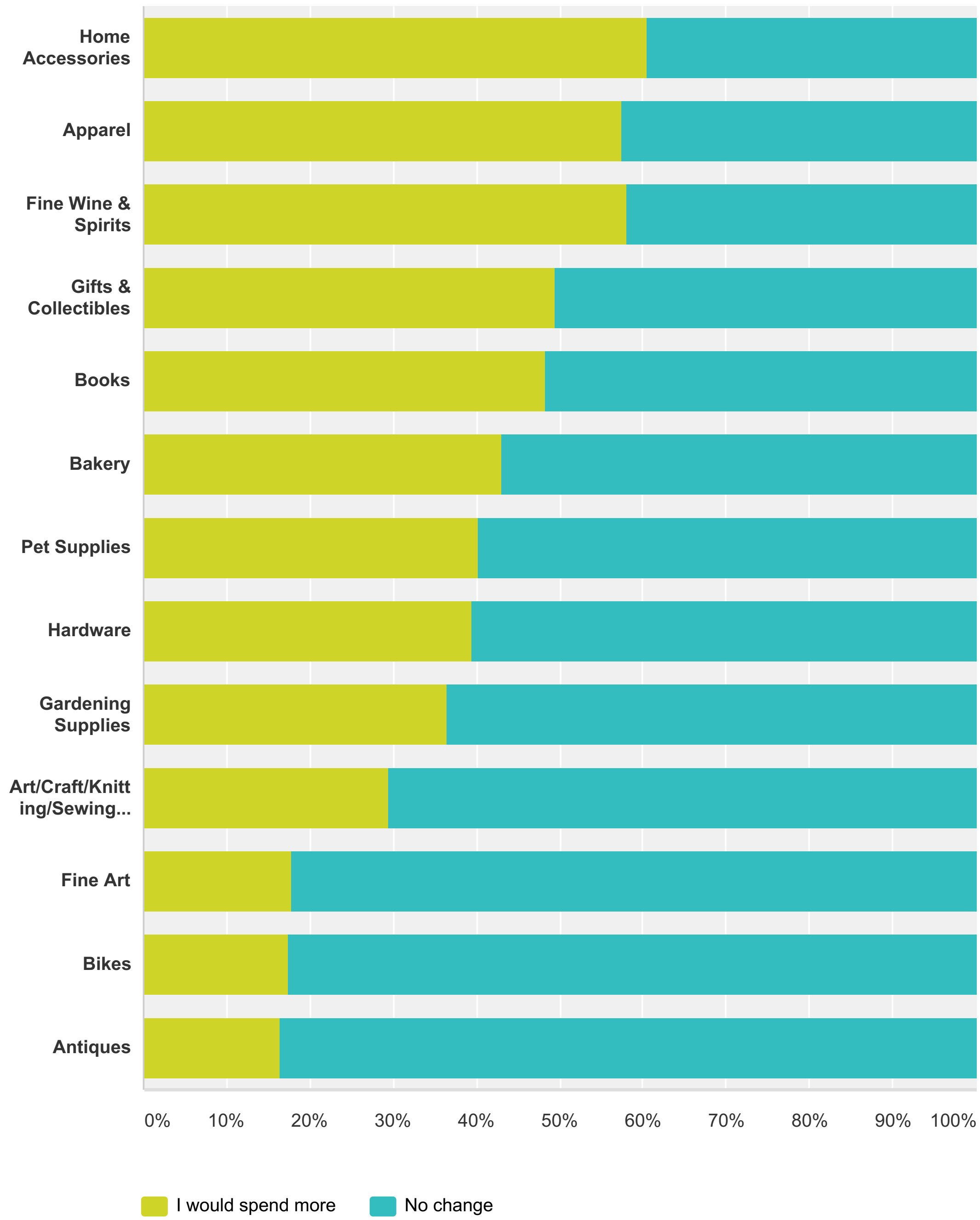
Answered: 1,017 Skipped: 87



	At least weekly	At least once a month	Rarely	Never	Total
Green Mount Road/Central Park Drive Area	**36.44%** 368	**54.75%** 553	**7.43%** 75	**1.39%** 14	1,010
Fairview Heights	**22.24%** 222	**69.44%** 693	**7.52%** 75	**0.80%** 8	998
Online	**19.73%** 190	**58.67%** 565	**17.55%** 169	**4.05%** 39	963
Downtown O'Fallon	**13.12%** 133	**40.14%** 407	**38.46%** 390	**8.28%** 84	1,014
Missouri side of river	**6.87%** 68	**39.49%** 391	**41.52%** 411	**12.12%** 120	990
Belleville	**2.52%** 25	**29.87%** 296	**49.24%** 488	**18.37%** 182	991
Edwardsville	**1.02%** 10	**9.30%** 91	**38.00%** 372	**51.69%** 506	979

Q6 How would the addition of stores carrying these items affect the amount of money that you spend in Downtown O'Fallon?

Answered: 996 Skipped: 108



	I would spend more	No change	Total
Home Accessories	60.44% 576	39.56% 377	953

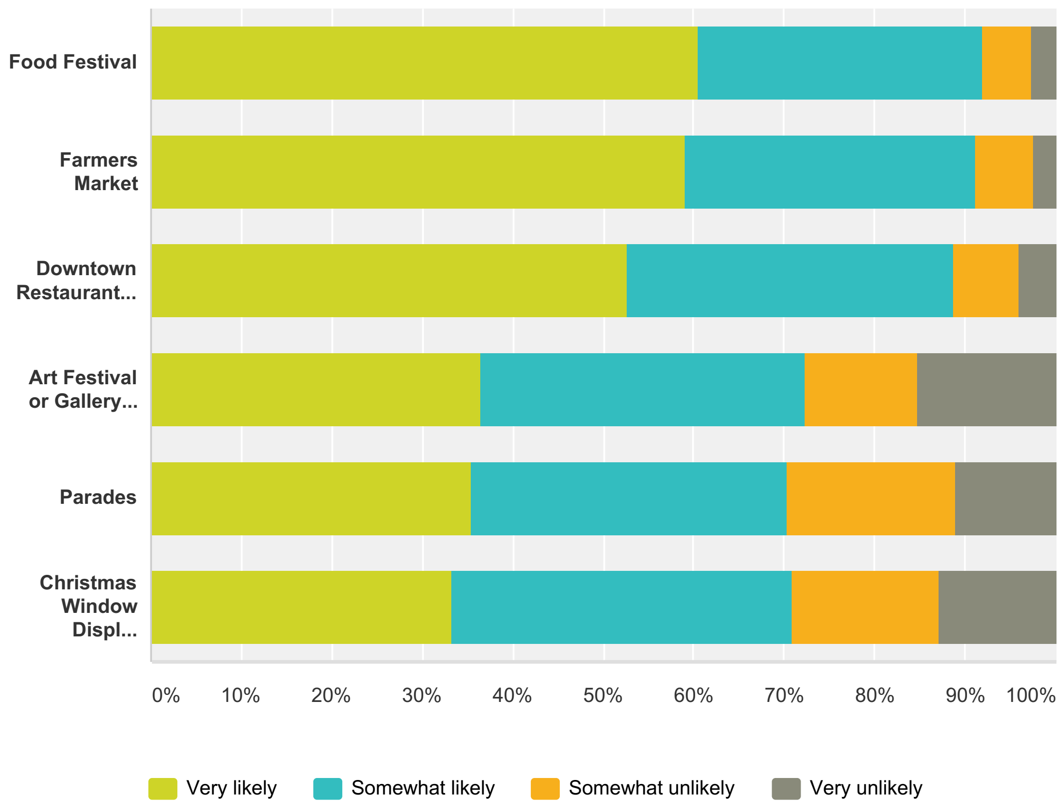
Apparel	**57.57%** 536	**42.43%** 395	931
Fine Wine & Spirits	**58.17%** 552	**41.83%** 397	949
Gifts & Collectibles	**49.52%** 463	**50.48%** 472	935
Books	**48.30%** 454	**51.70%** 486	940
Bakery	**43.07%** 410	**56.93%** 542	952
Pet Supplies	**40.37%** 369	**59.63%** 545	914
Hardware	**39.40%** 366	**60.60%** 563	929
Gardening Supplies	**36.52%** 340	**63.48%** 591	931
Art/Craft/Knitting/Sewing Supplies	**29.53%** 274	**70.47%** 654	928
Fine Art	**17.90%** 165	**82.10%** 757	922
Bikes	**17.39%** 160	**82.61%** 760	920
Antiques	**16.40%** 154	**83.60%** 785	939

Q7 What non-O'Fallon store have you visited that you think would be a good addition to Downtown O'Fallon?

Answered: 435 Skipped: 669

Q8 How likely is it that you would attend these Downtown O'Fallon events?

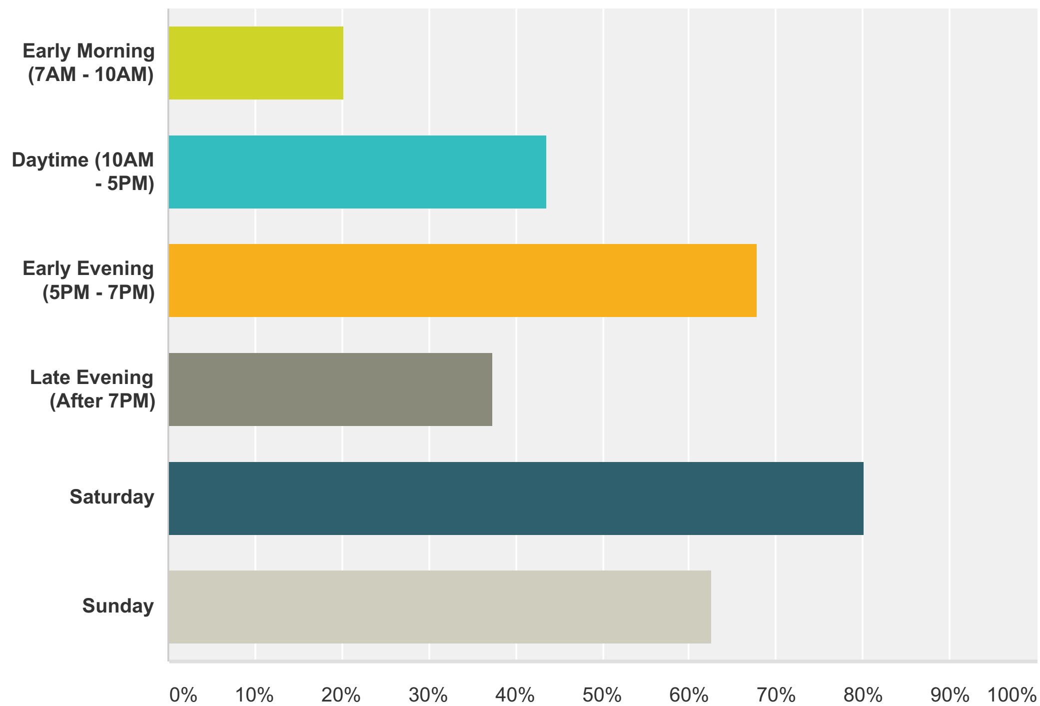
Answered: 988 Skipped: 116



	Very likely	Somewhat likely	Somewhat unlikely	Very unlikely	Total
Food Festival	**60.56%** 588	**31.41%** 305	**5.36%** 52	**2.68%** 26	971
Farmers Market	**59.11%** 574	**32.13%** 312	**6.39%** 62	**2.37%** 23	971
Downtown Restaurant Tastings	**52.75%** 509	**36.06%** 348	**7.15%** 69	**4.04%** 39	965
Art Festival or Gallery Walks	**36.39%** 349	**35.87%** 344	**12.51%** 120	**15.22%** 146	959
Parades	**35.52%** 341	**34.90%** 335	**18.65%** 179	**10.94%** 105	960
Christmas Window Display Contest	**33.23%** 318	**37.72%** 361	**16.30%** 156	**12.75%** 122	957

Q9 When is it convenient for you to shop? (Mark all that apply)

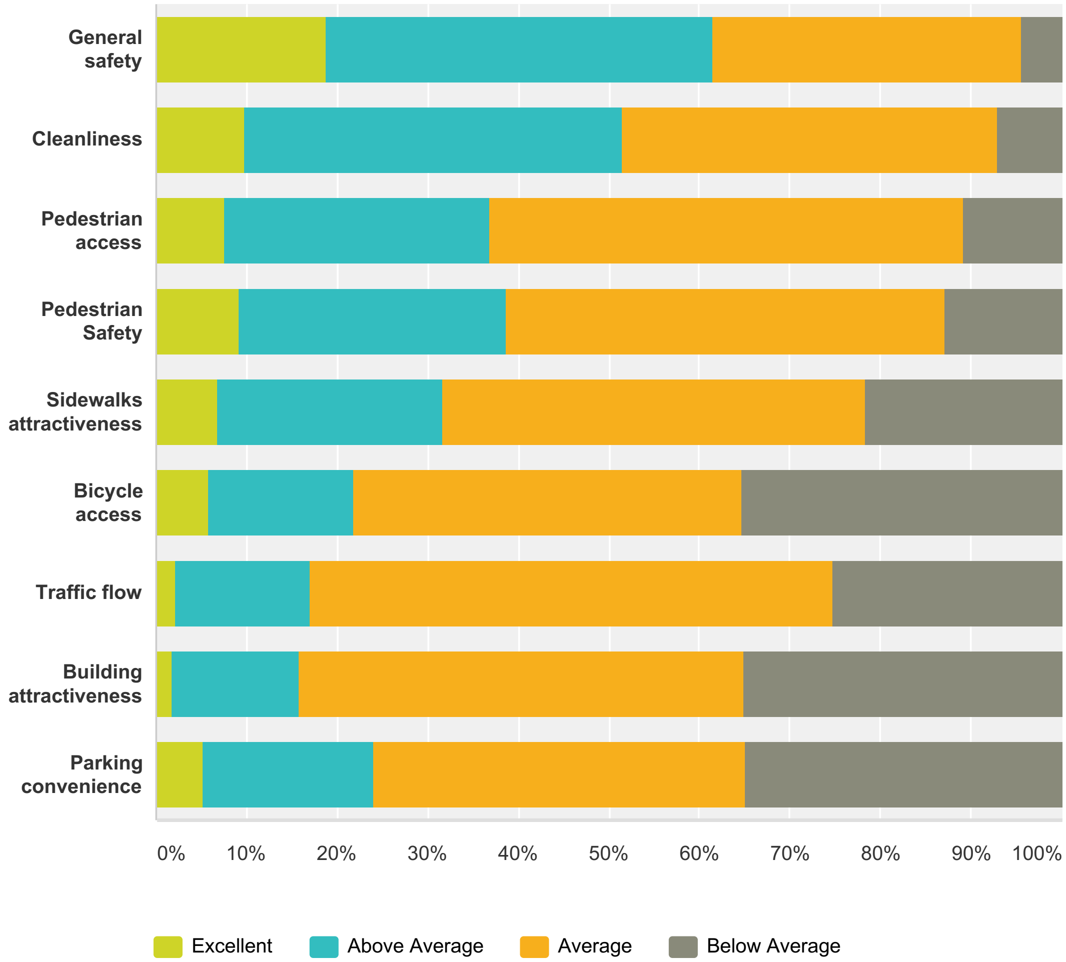
Answered: 986 Skipped: 118



Answer Choices	Responses	
Early Morning (7AM - 10AM)	**20.28%**	200
Daytime (10AM - 5PM)	**43.61%**	430
Early Evening (5PM - 7PM)	**67.95%**	670
Late Evening (After 7PM)	**37.32%**	368
Saturday	**80.12%**	790
Sunday	**62.58%**	617
Total Respondents: 986		

Q10 Rate your overall satisfaction with these factors as they apply to Downtown O'Fallon:

Answered: 988 Skipped: 116

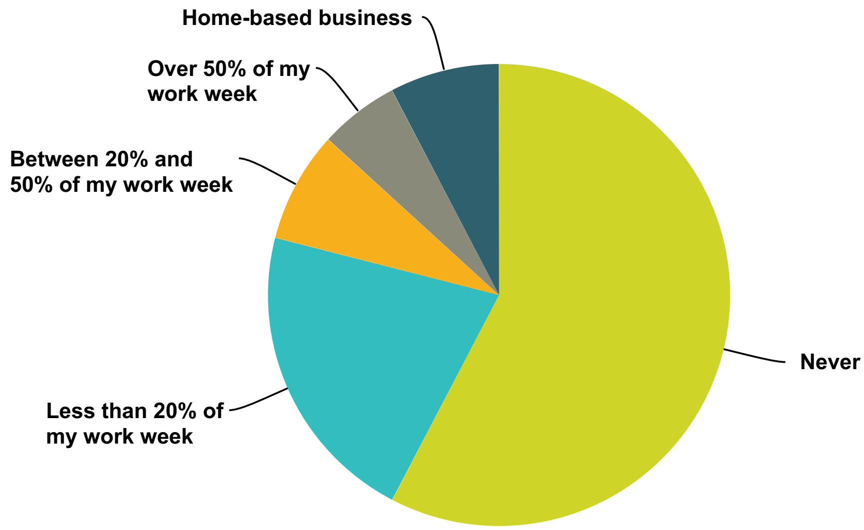


	Excellent	Above Average	Average	Below Average	Total
General safety	**18.87%** 183	**42.68%** 414	**34.02%** 330	**4.43%** 43	970
Cleanliness	**9.74%** 95	**41.85%** 408	**41.44%** 404	**6.97%** 68	975
Pedestrian access	**7.70%** 73	**29.11%** 276	**52.32%** 496	**10.86%** 103	948
Pedestrian Safety	**9.27%** 88	**29.40%** 279	**48.47%** 460	**12.86%** 122	949
Sidewalks attractiveness	**6.78%** 65	**24.92%** 239	**46.72%** 448	**21.58%** 207	959
Bicycle access	**5.77%** 39	**15.98%** 108	**42.90%** 290	**35.36%** 239	676

Traffic flow	**2.26%** 22	**14.71%** 143	**57.72%** 561	**25.31%** 246	972
Building attractiveness	**1.86%** 18	**14.06%** 136	**49.02%** 474	**35.06%** 339	967
Parking convenience	**5.12%** 50	**18.83%** 184	**41.25%** 403	**34.80%** 340	977

Q11 If you are employed, how frequently do you work from home rather than from your office?

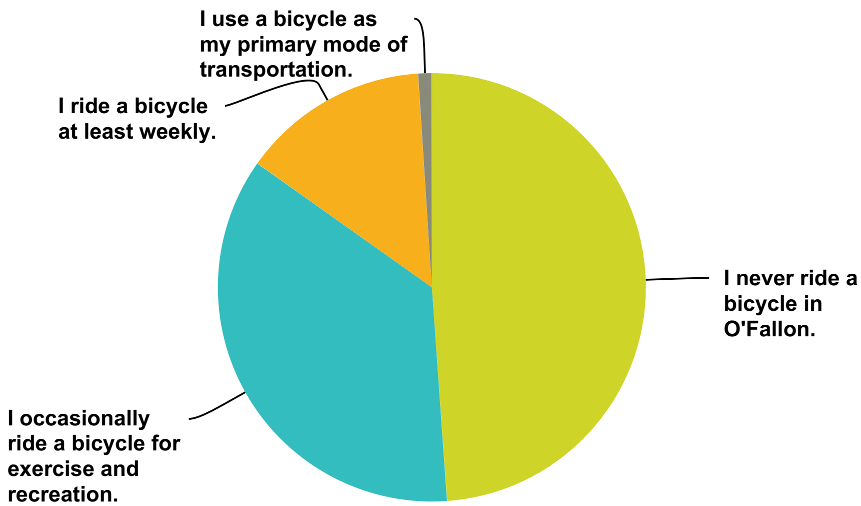
Answered: 862 Skipped: 242



Answer Choices	Responses	
Never	**57.66%**	497
Less than 20% of my work week	**21.35%**	184
Between 20% and 50% of my work week	**7.77%**	67
Over 50% of my work week	**5.57%**	48
Home-based business	**7.66%**	66
Total		**862**

Q12 How often do you ride a bicycle?

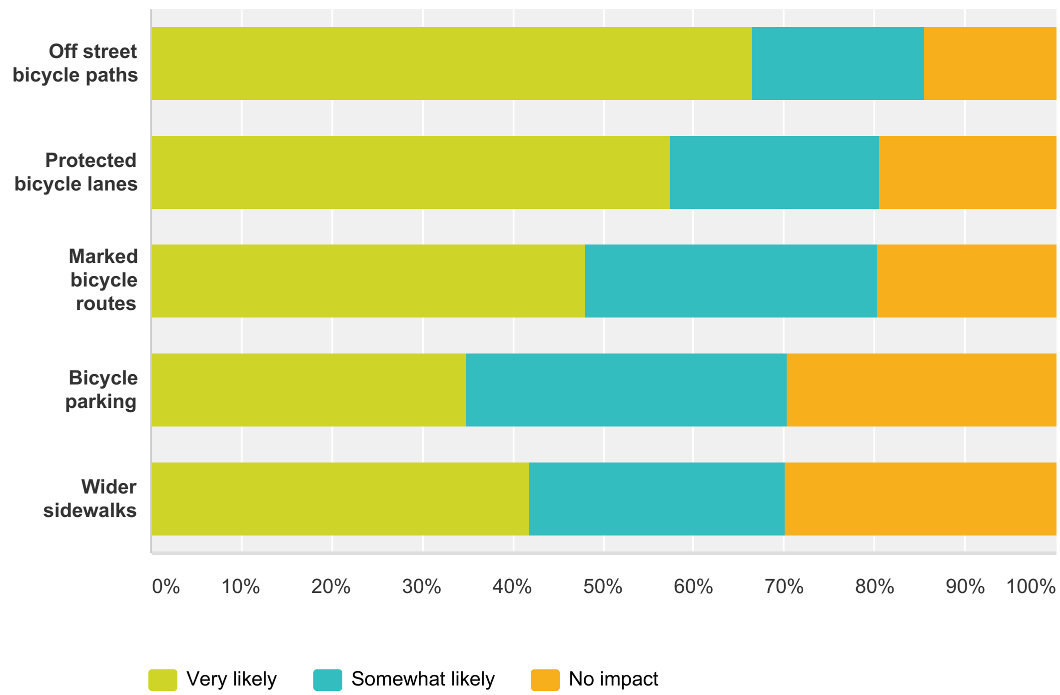
Answered: 982 Skipped: 122



Answer Choices	Responses	
I never ride a bicycle in O'Fallon.	**48.88%**	480
I occasionally ride a bicycle for exercise and recreation.	**35.95%**	353
I ride a bicycle at least weekly.	**14.15%**	139
I use a bicycle as my primary mode of transportation.	**1.02%**	10
Total		**982**

Q13 How likely are you to increase how often you bicycle to Downtown O'Fallon if these changes are made?

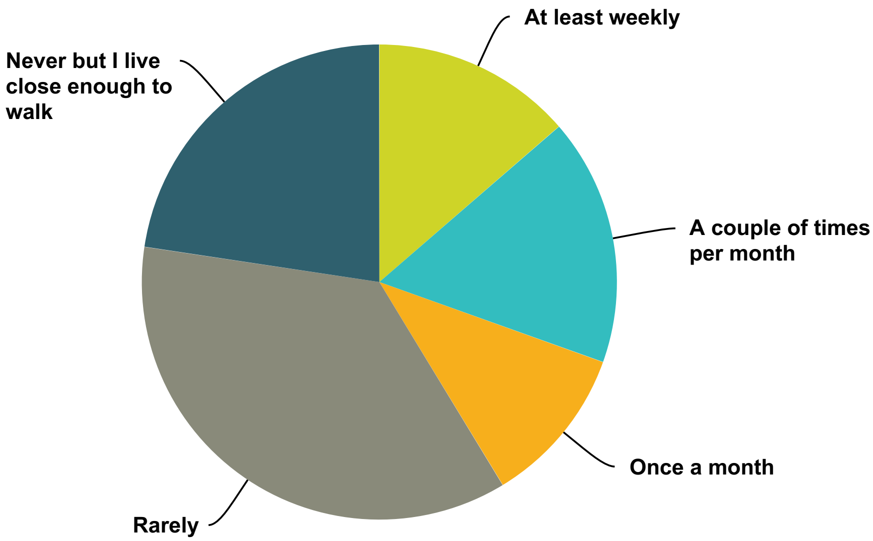
Answered: 501 Skipped: 603



	Very likely	Somewhat likely	No impact	Total
Off street bicycle paths	**66.47%** 331	**19.08%** 95	**14.46%** 72	498
Protected bicycle lanes	**57.58%** 285	**23.03%** 114	**19.39%** 96	495
Marked bicycle routes	**48.19%** 239	**32.26%** 160	**19.56%** 97	496
Bicycle parking	**34.89%** 172	**35.50%** 175	**29.61%** 146	493
Wider sidewalks	**41.94%** 208	**28.23%** 140	**29.84%** 148	496

Q14 How often do you walk to Downtown O'Fallon?

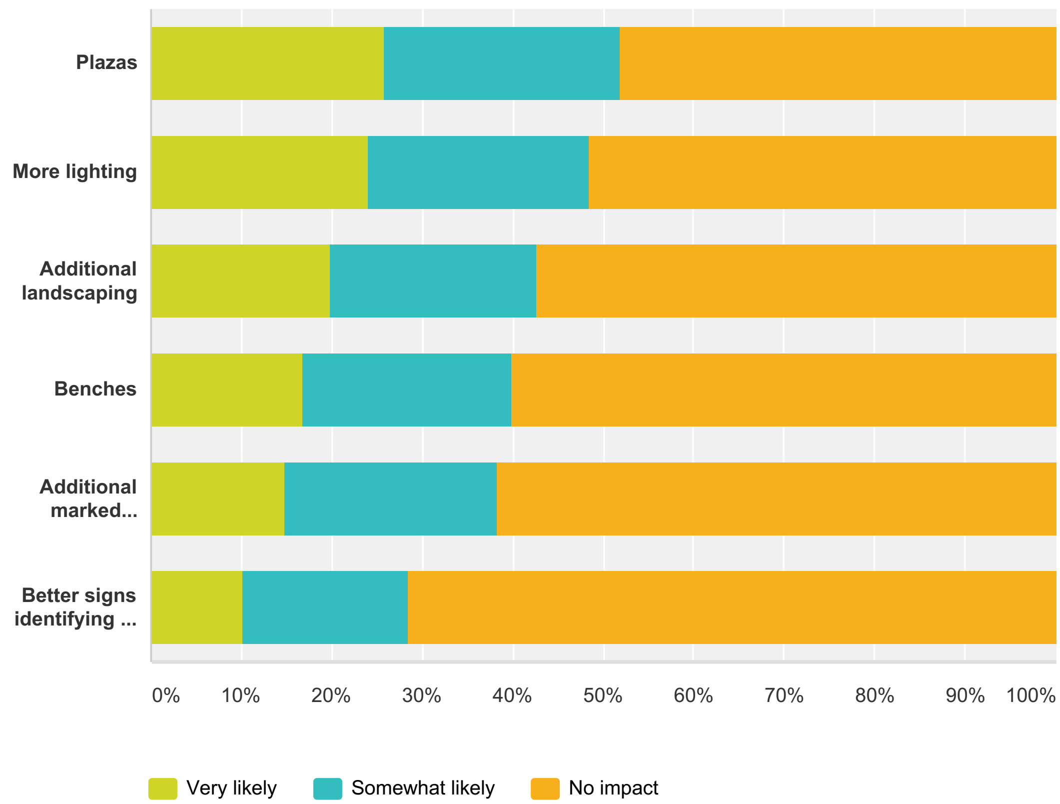
Answered: 981 Skipped: 123



Answer Choices	Responses	
At least weekly	13.64%	73
A couple of times per month	16.82%	90
Once a month	10.84%	58
Rarely	36.07%	193
Never but I live close enough to walk	22.62%	121
Total		**535**

Q15 How likely are you to walk to Downtown O'Fallon more often if these changes are made?

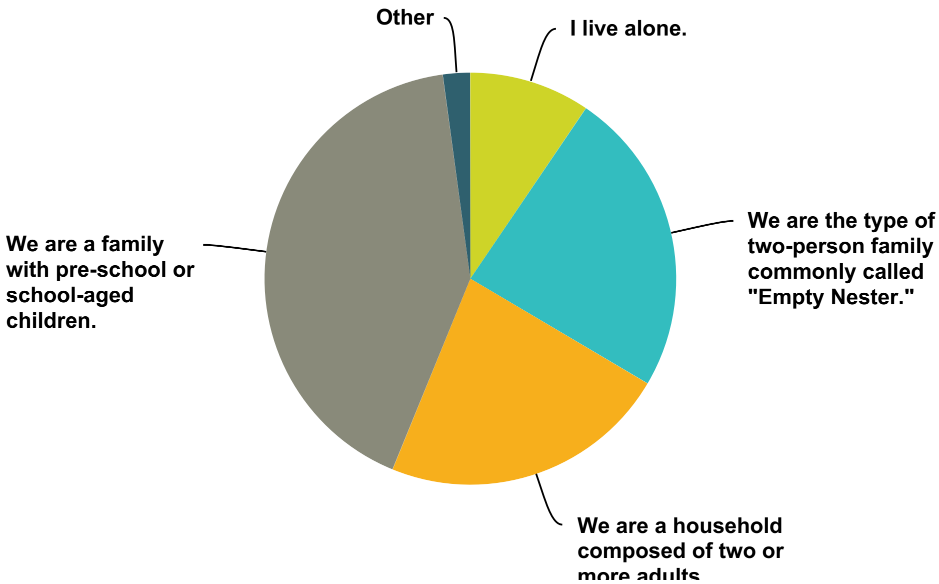
Answered: 858 Skipped: 246



	Very likely	Somewhat likely	No impact	Total
Plazas	**25.88%** 220	**26.12%** 222	**48.00%** 408	850
More lighting	**24.00%** 204	**24.59%** 209	**51.41%** 437	850
Additional landscaping	**19.88%** 169	**22.71%** 193	**57.41%** 488	850
Benches	**16.77%** 142	**23.14%** 196	**60.09%** 509	847
Additional marked crosswalks	**14.92%** 127	**23.27%** 198	**61.81%** 526	851
Better signs identifying the route	**10.23%** 86	**18.31%** 154	**71.46%** 601	841

Q16 Choose the answer that best describes your household.

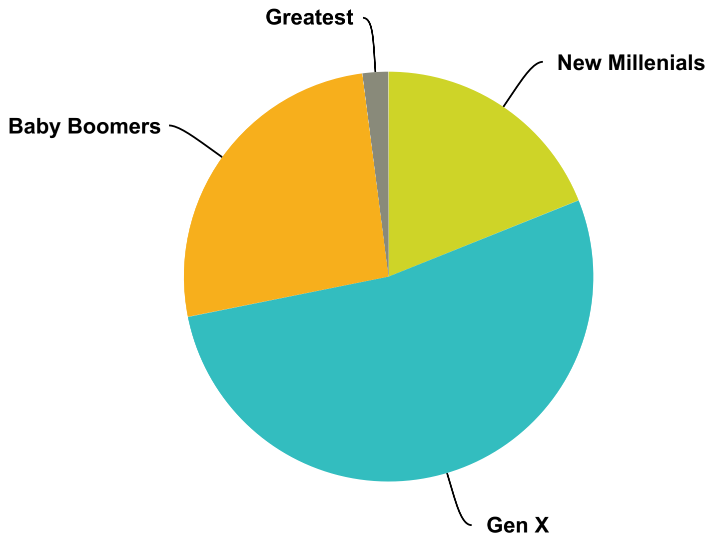
Answered: 979 Skipped: 125



Answer Choices	Responses	
I live alone.	9.50%	93
We are the type of two-person family commonly called "Empty Nester."	24.00%	235
We are a household composed of two or more adults.	22.68%	222
We are a family with pre-school or school-aged children.	41.68%	408
Other	2.15%	21
Total		**979**

Q17 Please choose the category that matches your age.

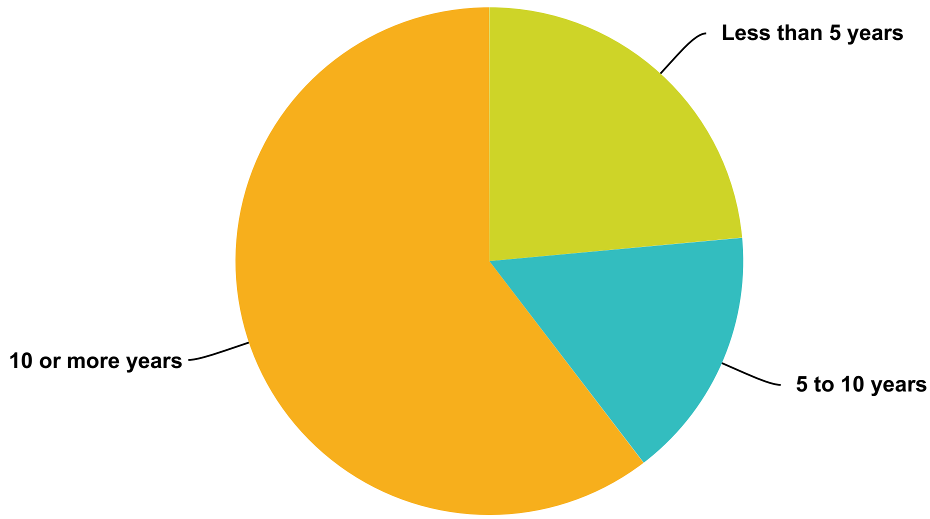
Answered: 977   Skipped: 127



Answer Choices	Responses	
New Millenials	18.94%	185
Gen X	52.92%	517
Baby Boomers	26.10%	255
Greatest	2.05%	20
Total		**977**

Q18 How long have you lived in O'Fallon?

Answered: 977 Skipped: 127



Answer Choices	Responses	
Less than 5 years	**23.54%**	230
5 to 10 years	**16.07%**	157
10 or more years	**60.39%**	590
Total		**977**

Q19 In what ZIP code is your home located? (enter 5-digit ZIP code; for example, 00544 or 94305)

Answered: 972 Skipped: 132

ZIP	#
63104	3
62234	5
62226	6
62232	6
62221	11
62254	13
62208	16
62669	884
Other	18

Q20 Any comments or ideas?

Answered: 431 Skipped: 673

Q21 If you would like to learn the results of this survey and occasionally be asked to provide additional comments on Downtown O'Fallon, please provide this information. Note that your information will not be shared with any other users.

Answered: 406 Skipped: 698

Answer Choices	Responses	
Name:	**97.54%**	396
Company:	**0.00%**	0
Address:	**0.00%**	0
Address 2:	**0.00%**	0
City/Town:	**0.00%**	0
State:	**0.00%**	0
ZIP:	**0.00%**	0
Country:	**0.00%**	0
Email Address:	**100.00%**	406
Phone Number:	**0.00%**	0