

KEWAUNEE, WISCONSIN

# 2017 RETAIL MARKET ANALYSIS

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APRIL 2018



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## Introduction

Kewaunee is a town on the shore of Lake Michigan, just south of Door County, which is perhaps Wisconsin's best-known tourist destination. Kewaunee is also less than an hour from Green Bay, the largest nearby city with an airport. Kewaunee is a pleasant and beautiful city that affords a community lifestyle and abundant recreational activities. Hiking, biking, winter sports, a Rails-to-Trails trail system, the county fair, and many other activities offer something for nearly everyone. There are several inland lakes, and Lake Michigan, all of which offer world-class boating, sailing, fishing, kayaking, canoeing, and other water sports. Between having a great lifestyle for residents, year-round sports, community events, and being the gateway to Door County, as Americans increase their travel and recreation budgets, now is the time for Kewaunee to make the most of all that it has to offer.

The purpose of this report is to estimate and assess the potential for tourism-related and retail development in Kewaunee. Throughout this report, we will examine the trends and growth potential for new business development in Kewaunee.

## Retail Businesses

Attracting retail, which used to nearly be a matter of making a phone call, has now become a profession, an art and science, and an active economic development strategy. Retailers have highly developed and often rigid formulas for where they choose to build new stores; these site selection strategies may not consider local conditions that could contribute to a successful store location.

Since the recession, the retail industry has been impacted by the following factors that are contributing to many store closings:

- An overbuilt market or retail “bubble”
- The rise of e-commerce
- The decline of malls
- Shifting consumer buying behaviors

Prior to the recession, retail and restaurant chains built new stores rapidly and nearly anywhere they could. While they may have had site selection methodologies, they were highly driven to put in as many locations as possible. Walmart is the classic example, and before them, K-Mart. The 1990s and early 2000s saw what some might call unrestrained expansion. It was easy for most towns to call up a Wendy's or Walmart and ask them to come to build a new store. According to many industry experts, that rapid expansion led to a retail 'bubble' like the housing “bubble.” These analysts now estimate that the recent spate of announced store closings is due to a needed market correction more than other factors.

Retail was acutely hit during the recession, and coming out of the recession, retail businesses were further impacted by the rise of Amazon. While this is often cited as a major reason for the decline of brick-and-mortar stores, e-commerce is about 10% of total retail spending in the U.S., meaning that consumers continue to buy about 90% of all purchases in stores.

Malls, however, are in sharp decline. A new phenomenon in the 1960s and 1970s, malls are now considered ancient. About a third of U.S. malls are either being completely revamped or torn down. Not a single new mall has been built in the U.S. since 2005, and some estimates are that another 30% will close in the coming years. Malls that have invested heavily in renovations and in maintaining a high-end or luxury shopping experience are doing well. However, many of the recent store closings and announced closings have been for mall-based locations. Closing department stores – Macy’s, JC Penney, and Sears, among others – are often anchor stores in malls. Without these stores, affected malls can experience a rapid downward spiral as remaining stores renegotiate leases because of declining foot traffic.

While some longtime retail chains are closing, many new chains are rising in their places and expanding rapidly. New stores, such as Bonobos, Shinola, and Warby Parker, are opening new stores in urban centers across the country. They are part of a migration of retail back to urban centers and away from suburban mall locations. Often these new stores combine online shopping with in-store shopping and service. The stores keep little inventory on hand. Shoppers can try on clothes and peruse store offerings, but their purchases are made online. These stores are smaller, which is more suited to dense urban and downtown areas. They offer more service and a more personalized shopping experience. Finally, with smaller inventories, these new types of chain stores can innovate rapidly and change seasonal offerings more quickly and at lower inventory cost. For downtown areas and smaller towns, these trends offer hope to bring retail back to Main Street. Since the recession, consumer spending has trended away from clothing and traditional department store offerings and toward travel, dining and entertainment and tech products. This trend lends itself well to the downtown boutique shopping experience in a very mixed retail setting.

In every commercial setting, retail follows rooftops. The more people there are in an area, the more retail will be found. Boutique retail, locally owned and operated shops are the most common, and if operated well, the most successful in small markets.

## Tourism in Kewaunee and Door County

Kewaunee is situated along the shore of Lake Michigan and south of Door County, one of Wisconsin’s primary tourist destinations. Many of the tourism-related services discussed in this report as having greater potential for Kewaunee are well represented throughout Door County. While this competition should be considered, as a gateway to Door County, many visitors may well regard Kewaunee as a natural stop-over or otherwise good alternative to heading all the

way to Door County. If the Kewaunee area is seen as more of an authentic local experience, with less traffic and crowding, or as having more natural amenities, well thought-out retail or service businesses should thrive. Finally, as shown throughout this report, the retail demand in Kewaunee is met overwhelmingly by out-of-region sales.

An estimated 3 million visitors travel to Door County in 2016.<sup>1</sup> These visitors spent an estimated \$350 million or approximately \$115 per traveler. In contrast, tourism revenues in Kewaunee were estimated to be about \$18 million in 2016, or only about 5% of Door County revenues. This would seem to indicate the opportunity for Kewaunee to capture some of the tourism and recreation spending currently going to Door County businesses.

## Report Overview

Retail leakage studies start with a local area such as a smaller city to understand how much of the estimated local demand is not being met by area retailers, tourism, recreation, and accommodation businesses. Next, we consider the broader region to understand how far people are traveling to shop or play. If people drive less than half an hour outside of the target area for shopping or recreation, it's going to be hard for that target area to make a case to a retailer to open a new location.

In the first part of this report, we examine regional demographics and next match the demographics to household spending patterns. Combined, we present a table showing regional demand and supply. Section I also presents typical store characteristics, by retail type, from the U.S. Census of Retailers.

The next part of the report discusses store location criteria by type of store. Most types of retail have guidelines on site selection factors. For example, grocery stores in a suburban area plan on drawing from a three-minute drive time. In the grocery store example, we would look at demand within a three-minute drive time. But for furniture stores or car dealerships, we would be looking at demand within a longer driving radius. If Ikea's criteria, for example, are that it draws from a 90-minute drive radius, then a town within a two-hour drive from an Ikea store could have a difficult time persuading Ikea to open another location in the town.

Located in Kewaunee County, Wisconsin, the City of Kewaunee is about a 30-mile drive to Green Bay and is part of the Green Bay MSA. Kewaunee is just south of and the gateway to Door County, Wisconsin's premier tourist destination. This study estimates the demand, supply, and retail gap by type of store or tourism-related business for both Kewaunee (at the zip code

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<sup>1</sup> Last year for which data are available. <http://industry.travelwisconsin.com/research/economic-impact/economic-impact-2016>

level) and Kewaunee County based on site selection preferences for major chains (by type of chain).

## Gap Analysis

### Supply and Demand

Table 1 shows the total spending by Kewaunee residents by type of purchase along with sales to people outside of Kewaunee who buy from local retailers and tourism-related businesses. Across all categories, local demand for products, including visitors, was \$90 million. However, total sales in 2017 by Kewaunee retailers and tourism-related businesses were about \$22 million. Not shown in Tables 1 or 2 are an additional estimated \$7 million internet and online purchases by Kewaunee residents. Combined, there is an estimated gap of potential retail sales in Kewaunee of about \$75 million.

Table 1: Estimated Demand, Retail Sales, Kewaunee (Zip Code 54216), 2017

Description	2017 Estimated Purchases by Kewaunee Residents within Kewaunee	2017 Estimated Purchases by Kewaunee Residents from Outside of Kewaunee	2017 Estimated Purchases by Kewaunee Visitors	2017 Total Demand Potential for Kewaunee Businesses	2017 Estimated Cost of Goods Sold	2017 Estimated Potential Sales for Kewaunee Businesses
Automobile Dealers	\$671,514	\$3,838,074	\$2,082,426	\$6,592,014	\$1,977,605	\$8,569,619
Boat Dealers	\$197,240	\$262,729	\$1,149,076	\$1,609,045	\$482,713	\$2,091,758
Automotive Parts, Accessories, and Tire Stores	\$66,246	\$1,121,238	\$128,345	\$1,315,829	\$394,748	\$1,710,577
Furniture and Home Furnishings Stores	\$0	\$1,207,580	\$0	\$1,207,580	\$362,274	\$1,569,854
Electronics and Appliance Stores	\$0	\$1,564,105	\$0	\$1,564,105	\$469,232	\$2,033,337
Building Material, Supplies, Lawn and Garden Equipment Dealers	\$30,213	\$2,869,447	\$157,412	\$3,057,072	\$917,121	\$3,974,193
Grocery Stores	\$370,439	\$3,858,638	\$3,149,159	\$7,378,236	\$2,213,471	\$9,591,707
Specialty Food Stores, incl. Liquor Stores	\$0	\$736,317	\$0	\$736,317	\$220,896	\$957,213
Health and Personal Care Stores	\$0	\$2,944,365	\$0	\$2,944,365	\$883,309	\$3,827,674
Gasoline Stations with Convenience Stores	\$372,298	\$1,016,287	\$1,102,822	\$2,491,408	\$747,422	\$3,238,830
Clothing, Shoe, and Accessory Stores	\$0	\$2,284,159	\$0	\$2,284,159	\$685,247	\$2,969,406
Sporting Goods, Hobby, Music, and Book Stores	\$0	\$1,038,808	\$0	\$1,038,808	\$311,642	\$1,350,450
General Merchandise Stores, incl. Department Stores	\$628,684	\$4,166,419	\$1,569,305	\$6,364,408	\$1,909,322	\$8,273,730
Other Miscellaneous Store Retailers	\$0	\$2,441,573	\$0	\$2,441,573	\$732,472	\$3,174,045
Recreational Goods Rental	\$6,658	\$36,142	\$821	\$43,621	\$13,029	\$56,650
Amusement and Recreation Industries	\$753,667	\$4,473,426	\$3,015,185	\$8,242,278	\$2,472,684	\$10,714,962
Traveler Accommodation	\$273,459	\$3,975,326	\$187,748	\$4,436,533	\$1,086,887	\$5,523,421
RV (Recreational Vehicle) Parks and Recreational Camps	\$114,162	\$27,153	\$2,153,571	\$2,294,887	\$688,465	\$2,983,352
Restaurants, Bars, Food Services	\$1,968,135	\$11,709,764	\$1,572,886	\$15,250,786	\$2,530,483	\$17,781,269

Source: Emsi 2018.1 Dataset

Using average sales per store by type of store, we next calculated the estimated number of stores that could be supported by the volume of potential retail business in Kewaunee. Table 2 below shows the number of stores, by type of store, that can be supported in Kewaunee (zip code). Chart 1 following the table shows the potential number of stores that can be supported in Kewaunee County vs. at the Kewaunee zip code level. These numbers should be compared against the actual number of businesses in the county.

Table 2: Estimated Potential for Stores, Kewaunee. 2017

Description	2017 Estimated Potential Sales for Kewaunee Businesses, Zip Code Level	2017 Estimated Potential Sales for Kewaunee Businesses, County Level	Average Sales / Establishment	Potential # Establishments in Zip Code	Potential # Establishments in County
Automobile Dealers	\$8,569,619	\$21,656,886	\$17,000,000	0	1
Boat Dealers	\$2,091,758	\$2,992,926	\$3,500,000	1	1
Automotive Parts, Accessories, and Tire Stores	\$1,710,577	\$6,697,033	\$1,500,000	1	5
Furniture and Home Furnishings Stores	\$1,569,854	\$4,989,574	\$2,000,000	1	3
Electronics and Appliance Stores	\$2,033,337	\$6,450,071	\$2,300,000	1	3
Building Material, Supplies,Lawn and Garden Equipment Dealers	\$3,974,193	\$14,093,876	\$3,000,000	1	5
Grocery Stores	\$9,591,707	\$26,805,473	\$6,400,000	2	4
Specialty Food Stores, incl. Liquor Stores	\$957,213	\$7,606,690	\$1,200,000	1	7
Health and Personal Care Stores	\$3,827,674	\$17,366,095	\$3,000,000	2	6
Gasoline Stations with Convenience Stores	\$3,238,830	\$10,416,769	\$3,000,000	1	4
Clothing,Shoe, and Accessory Stores	\$2,969,406	\$9,962,386	\$1,800,000	2	6
Sporting Goods, Hobby, Music, and Book Stores	\$1,350,450	\$4,710,938	\$1,800,000	1	3
General Merchandise Stores, including Department Stores	\$8,273,730	\$20,786,789	\$1,000,000	8	21
Other Miscellaneous Store Retailers	\$3,174,045	\$12,392,067	\$1,200,000	3	10
Recreational Goods Rental	\$56,650	\$166,846	\$460,000	0	0
Amusement and Recreation Industries	\$10,714,962	\$24,061,359	\$1,500,000	5	16
Traveler Accommodation	\$5,523,421	\$18,973,872	\$3,000,000	2	6
RV (Recreational Vehicle) Parks and Recreational Camps	\$2,983,352	\$3,182,590	\$700,000	4	5
Restaurants, Bars, Food Services	\$17,781,269	\$61,689,566	\$1,200,000	15	51

Source: Emsi 2018.1 Dataset and U.S. Retail Census, 2012

Chart 1: Estimated Number of Potential Stores, in Kewaunee and Kewaunee County

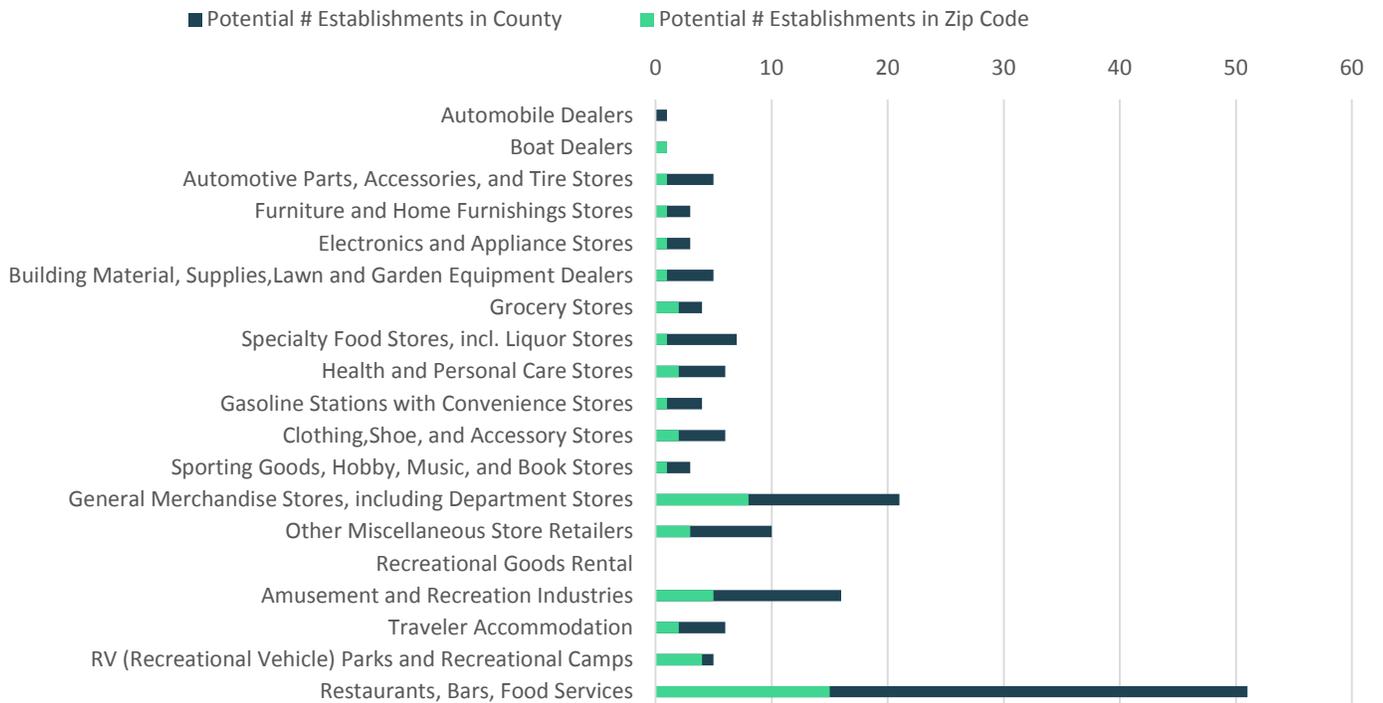


Table 3 further highlights the potential for more retail and tourism-related business capacity in Kewaunee. This table shows the location quotient and current employment. The location quotient shows that the concentration of retail or tourism services in Kewaunee County is lower than expected. While a location quotient of 1.0 is the national average for each type of business, generally location quotients of less than 1.2 are considered to be low levels of business concentration.<sup>2</sup>

Table 3: Estimated Retail Presence in Kewaunee County, 2017

Description	2017 Location Quotient	2017 Jobs, Kewaunee County
Automobile Dealers	0.4	31
Boat Dealers	1.6	14
Automotive Parts, Accessories, and Tire Stores	0.8	27
Furniture and Home Furnishings Stores	0.1	5
Electronics and Appliance Stores	0.1	8
Building Material, Supplies, Lawn and Garden Equipment Dealers	0.4	34
Grocery Stores	1.2	189
Specialty Food Stores, incl. Liquor Stores	2.9	43
Health and Personal Care Stores	0.5	34
Gasoline Stations with Convenience Stores	1.9	101
Clothing, Shoe, and Accessory Stores	0.0	10
Sporting Goods, Hobby, Music, and Book Stores	0.1	5
General Merchandise Stores, including Department Stores	0.3	44
Other Miscellaneous Store Retailers	0.6	16
Recreational Goods Rental	0.0	0
Amusement and Recreation Industries	1.3	133
Traveler Accommodation	0.3	37
RV (Recreational Vehicle) Parks and Recreational Camps	0.6	6
Restaurants, Bars, Food Services	0.8	421

<sup>2</sup> When analyzing business activity, one measure is regional concentration as compared to the national average for that type of business. This comparison reveals the relative concentration in the region by type of business, measured by location quotient (LQ; see more in the following paragraph). Business types with high concentration (or LQ) are said to be specialized in a region.

A location quotient shows a business type's share of an area's employment relative to the national average. For example, a location quotient of 2.0 indicates that the business segment accounts for twice the share of employment in the area than it does nationally, and a location quotient of 0.5 indicates that the area's share of employment in the industry is only half the national average. In Kewaunee County, the furniture stores segment of retail has an LQ of 0.38. This means that for the size of the economy of Kewaunee County, furniture stores have slightly more than one-third the level of concentration than would be expected in another economy of similar size.

Source: Emsi 2018.1 Dataset

## Methodology

The supply and demand for tourism-related services or retail products by type of product are derived from Emsi's Input-Output model, which incorporates data from the Bureau of Economic Analysis (BEA). An Input-Output model represents the flow of money in an economy. The demand estimate describes the purchases that consumers and local businesses make from retailers (by type of store or service) also estimates whether those purchases are made within or outside the region of study. Also known as a gap analysis, this report can be used to find demand leakage (for retail products) in the economy, or where money is leaving the region that might otherwise be captured.

We estimated the average sales per store or business using the U.S. Economic Census, 2012 (adjusting that data to 2017 dollars). To doublecheck these results, we next calculated average sales per store using Emsi's database, which compiles consumer spending and retail sales from federal and state sources. The results of these two methods yielded a narrow range of sales per store from which we determined an average estimate of sales per store by type of store. These results are shown in Table 2 and Chart 1 above.

It should be noted that the estimated sales per store can vary widely depending on store brand, exact types of items sold in the store (Pier 1 and Ikea are in the same category but are significantly different stores). Even within the same store brand, retailers have different sales expectations – sometimes stores with low sales volumes are maintained because of their strategic locations. The estimated number of stores by store type uses national averages for somewhat broad categories of stores. Automobile dealers, for example, include large new car dealers for the major automakers as well as small, local used car lots. Our estimation methods are quite conservative to not provide unrealistic expectations for potential start-ups.

## Kewaunee Demographic Overview

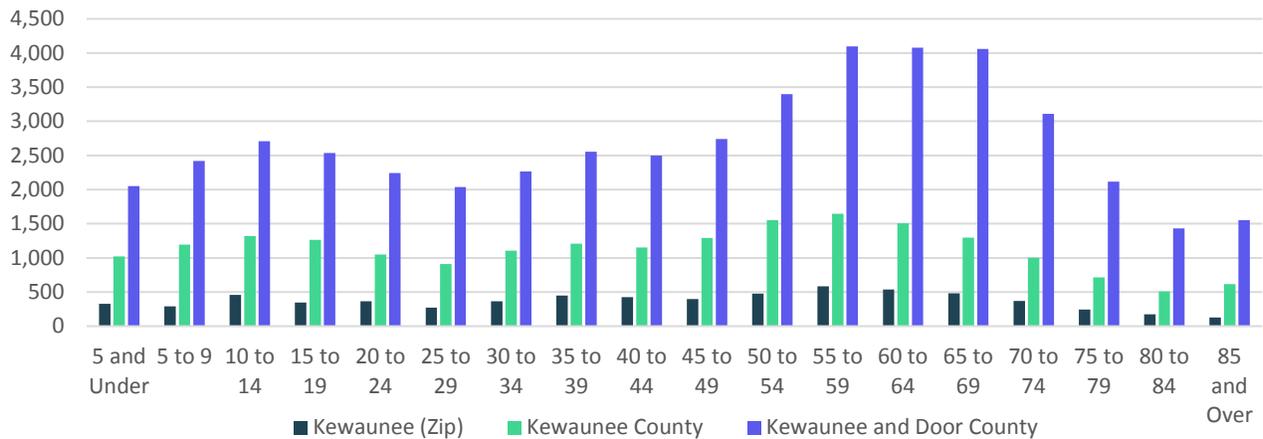
## Annual Population Growth, 2012-2017



### Population



## Population by Age Group

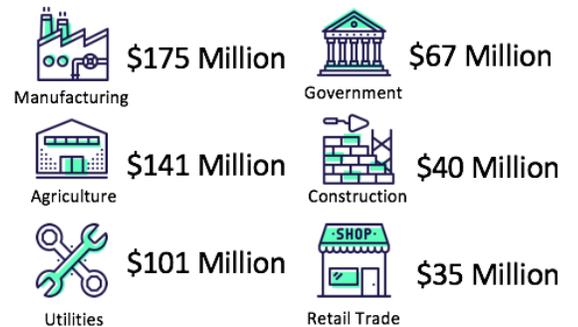


## Kewaunee County Largest Industries, 2017

Industry	Jobs
Agriculture, Forestry, Fishing, etc.	2,433
Manufacturing	1,924
Government	1,252
Retail Trade	564
Health Care and Social Assistance	498
Accommodation and Food Services	461
All Other Industries	2,068
<b>Total Jobs, Kewaunee County, 2017</b>	<b>9,200</b>

## Kewaunee County GRP

Total GRP \$718 Million



Average Earnings Per Job  
(Kewaunee County):  
**\$42,093**

Median Household Income  
(Kewaunee County): **\$58,200**

## Setting the Stage

The City of Kewaunee is to be commended for its recent efforts to eliminating blight and enforce property maintenance standards by hiring a building inspector/zoning administrator as a staff position. This is a strong statement by the community which says it prioritizes a clean and well-kept environment, so the community looks its best at all times. Addressing blighting influences such as peeling paint and/or garbage on the lawn is a foundational economic development practice. It shows that the community is investing in its health and future, so other interested parties should also invest – in a new business, in rehabbing an older building, in buying a home and raising a family in the community. This type of focus typically ends up going viral in its own way. Property owners start cleaning up their property and pretty soon the neighbors also start cleaning up their property. If blighting influences are left unchecked, it soon becomes commonplace, accepted and “the norm” to have junky, unattractive properties dotting the landscape.

## Recruiting Retailers

There are many reliable sources that can be considered when trying to attract potential retailers. “*Developing Successful Retail in Secondary and Rural Markets*,” a study conducted by the International Council of Shopping Centers, lays out a 10-step process to successfully pitch your region to potential retailers:

1. Establish a downtown/retail development committee
2. Create a business fact base
3. Assemble a database of available space inventory and lease/purchase terms
4. Prepare an inventory of economic development tools
5. Establish a profile of target merchant types and merchandise categories
6. Prepare a customized “sales package” for each targeted retailer
7. Hold broker roundtables and periodic update meetings
8. Initiate a series of local/regional prospecting trips
9. Makes sales calls on qualified prospects
10. Establish follow-up contract/reminder program

Most, if not all, of the preparatory steps laid out above can be completed using the data provided in this report. While these steps lay out a good framework for any region, there are still characteristics unique to Kewaunee. One of these characteristics is the retail demand potentially from tourism and visitors. Kewaunee’s largest challenge will be to not undersell the demand potential from both winning back residential business and attracting more visitor dollars.

Creating a business fact base, as noted in Step 2 from the list above, can have a great impact on a retailer's decision. Drawing again from *"Developing Successful Retail in Secondary and Rural Markets"* the business fact base should include but is not limited to:

1. Geographical description of drawing area or "trade area," including high – and low – traffic times
2. Demographic and economic profiles of trade area population
3. Growth projections of trade area population
4. Overview of significant additional audiences
5. Annual retail trends
6. Sales performance of key categories
7. Summary of projects underway with costs, opening dates, and statements of anticipated impact on consumer spending

Kewaunee has the tools, demand, and space for new retailers. With the criteria provided above, Kewaunee can properly package and display these strengths to potential retailers.

In *"Developing Successful Retail in Underserving Urban Markets,"* another study conducted by the International Council of Shopping Centers, retailers were surveyed about top factors when considering potential retail locations. The top five factors presented to retailers and the percentage of retailers that considered them to be a relevant factor to their site selection process are as follows:

1. Insufficient concentration on your customer target (88% considered this to be a relevant factor)
2. Length of time to complete the project (49% considered this to be a relevant factor)
3. Lack of consumer purchasing power for your product (86%)
4. Inadequate neighborhood infrastructure (73%)
5. Burdensome taxes relative to store locations (65%)

In the study noted above, retailers were focused mainly on the demographics of the considered market area. Factors like "project completion time" and "tax burdens" were considered by most retailers but were not nearly as relevant as the economic and demographic profiles of the trade area. Kewaunee can use this to their advantage when creating profiles of retailers to attract.

In Kewaunee, staff capacity at the City is limited to undertake this work. It will be important to create a volunteer Downtown Committee (see step 1 above) to support the efforts for business retention, as well as business recruitment. Real estate brokers are often great additions to this team.

Noted downtown author, speaker and consultant N. David Milder has created a matrix to compare various levels of active downtown recruitment and retention programs. Communities can take an active role at various levels depending on their capacity for staff, time, resources and goals. Although there is no downtown organization in Kewaunee now, a dedicated group of volunteers can accomplish business retention and attraction activities. In Kewaunee, leadership of the group will likely be responsible for keeping it on task and driving the work through the volunteers. Someone other than the City Administrator should be identified to lead the group, gather information on existing available buildings, put together the fact sheet on Kewaunee and set up the meetings with the other volunteers.

Strategy and goals for the downtown committee should include active business retention. This means for existing businesses, a relationship is established in an effort to understand the needs of existing businesses and work to meet those needs through networking and connections to financial, technical and other resources.

### Approaches to Business Recruitment

		Active			
Program Characteristics	Do-Nothing	Downtown Marketer	Deal Maker	Table Setter	Targeted Program
Are Types of Firms Targeted?	No	No	No	No	Yes
Downtown Organization does PR and advertising.	No	Yes	Yes	Yes	Yes
Downtown Organization does prospect cultivation.	No	No	Yes	Opportunistic	Yes
Who does the deal-making?	Brokers & Landlords	Brokers & Landlords	Downtown org & Landlords	Brokers & Landlords	Brokers & Landlords
Downtown Organization role in deal-making.	None	Referrer	Deal-maker	Match-maker	Match-maker
Downtown Organization has strong quality of life programs.	Maybe	Maybe	Maybe	Definitely	Probably
Downtown Organization has strategy.	No	No	No	Often Implicit	Some

Source: N. David Milder, DANTH, Inc.

## Site Selection Criteria by Type of Retail

Retailers use multiple methods to determine how they select their retail locations. Immediate trade area is defined by the market area from which retailers are pulling at least 75% of their sales. It is a geographical reference based on both potential and actual sales. Distance and drive time are factored in but vary by industry and retailer. Retailers that consider population in the immediate trade area versus a specific distance or drive time study the market purchasing patterns of residents. For most retailers, the primary market translates into a 10- to 15-minute drive time.

Each section has a figure that shows the number of establishments in Kewaunee depicted as blue storefronts next to the estimated number of stores that could also be supported in Kewaunee. These are depicted as green storefronts.

National retailers are identified in this report, not as an indication that Kewaunee would attract a national retailer, but to provide a national level of perspective related to the data presented on the local area.

Retail categories are presented in the order they appear on Table 1 above.

### Car Dealerships

The car dealership industry specializes in selling new and used cars. There are 3 car dealership establishments within a 10-minute drive of Kewaunee. With 3 dealerships, including both new and used car sales, it is likely there is little potential for another car dealership in the county or city of Kewaunee.

#### Site Selection

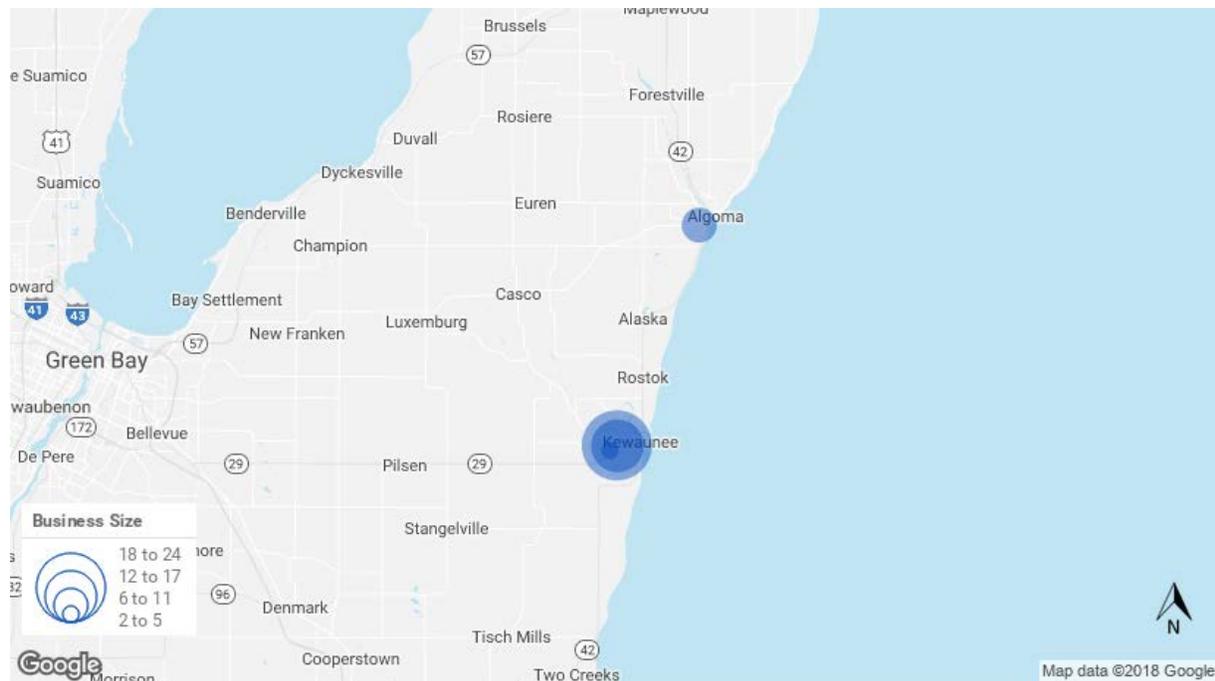
Car dealerships use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as the center point. The map below shows the location of current dealerships in Kewaunee (Figure 1).

Dealerships in small towns tend to sell 300 or fewer vehicles per year. At that low volume, it is difficult to justify marketing support, sales bonuses, consumer incentives, or the cost of carrying a floor plan. However, General Motors has long supported smaller stores in more rural areas, because these smaller, rural stores sell 80% of all the bigger pickup trucks. Nearly two-thirds of the sales of these stores are the larger pickup trucks (about 200 per store). These are high-margin vehicles, and sales of these trucks does support an otherwise low-volume store.

The larger trucks draw customers who will not normally drive into a large city to buy. These customers will drive to the next smaller town and buy whatever the dealer is selling. In other

words, these are high-value sales to customers who have little brand preference other than for General Motors, Ford, or Chrysler, as most international brands do not have comparable vehicles. Another important consideration is that maintenance and service work are significant sources of revenue to smaller dealerships; this work also builds customer and brand loyalty. Sometimes the value to the automaker is the presence of a dealership and the service it provides more than the actual vehicle sales. Another consideration for smaller communities to consider is that international-brand dealerships may be hard to recruit because the international automakers value high volume dealerships; Toyota and Honda, for example, continue to lead all automakers in number of sales per franchise – more than 3 times the sales of American-brand franchises. Across all automakers, 571 new franchises were created in 2016.

Figure 1. Map of Car Dealerships Within a Ten-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

### Retailer Profile

Fiat Chrysler Automobiles (FCA) has 2,851 dealerships across the United States and is planning to incorporate 380 new dealerships in the United States by the end 2017. This would bring the total dealership count for FCA to 3,231 locations, the highest it has been since 2009. In 2016, FCA sold over \$121 billion in vehicles.

## Auto Dealer Business Listings

Business Name	NAICS	Industry Name
Jorn's Chevrolet Inc	441110	New Car Dealers
Algoma Motors Inc	441110	New Car Dealers
Leon's Autobody & Sales	441120	Used Car Dealers

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

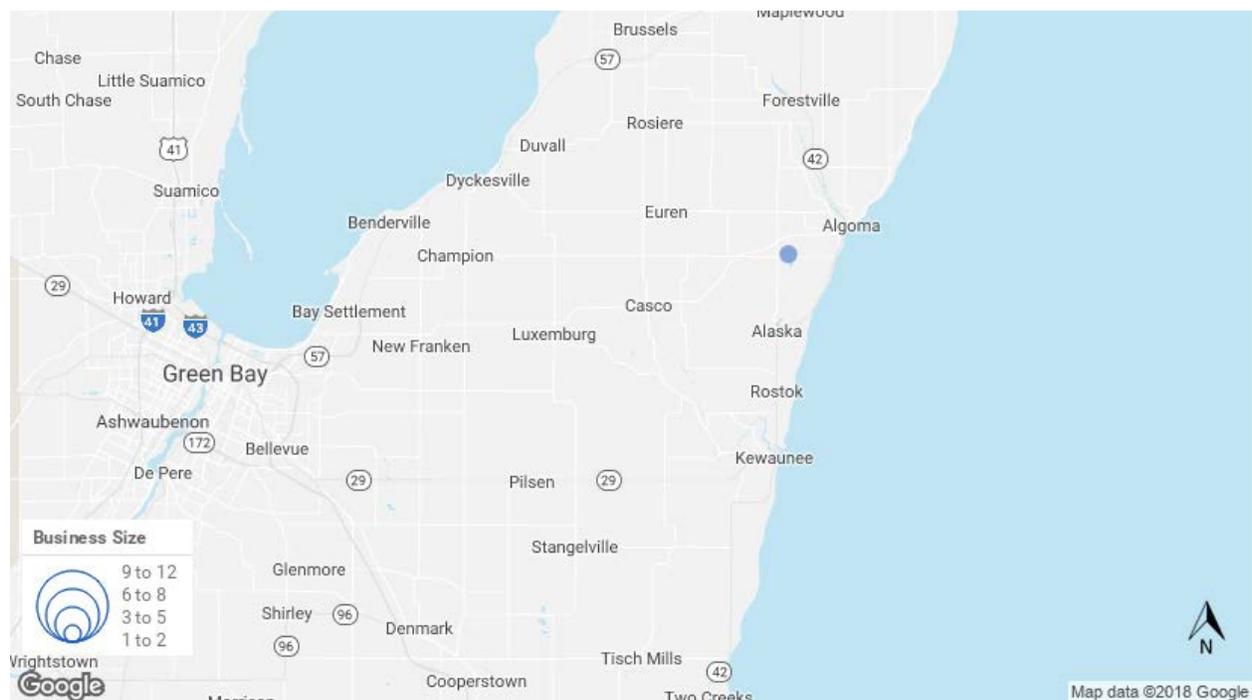
## Boat Dealers

Boat dealers sell new or used boats and parts. Often, boat dealerships combine boat sales with a combination of other activities, including repair services, engine work, refurbishing interiors, or selling replacement parts or accessories. Other activities include storage (usually winter storage), selling outboard motors, trailers, marine supplies, and offering services at marinas.

### Site Selection

Boat dealers and marine services businesses use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as the center point. Boat dealers and marine service businesses looking to establish a business location in Kewaunee can see where competitors are already located (Figure 2).

Figure 2. Boat Dealers Within a Ten-Minute Drive of Kewaunee



## Business Listings

Business Name	NAICS	Industry Name
Dans Prop Shop	441222	Boat Dealers

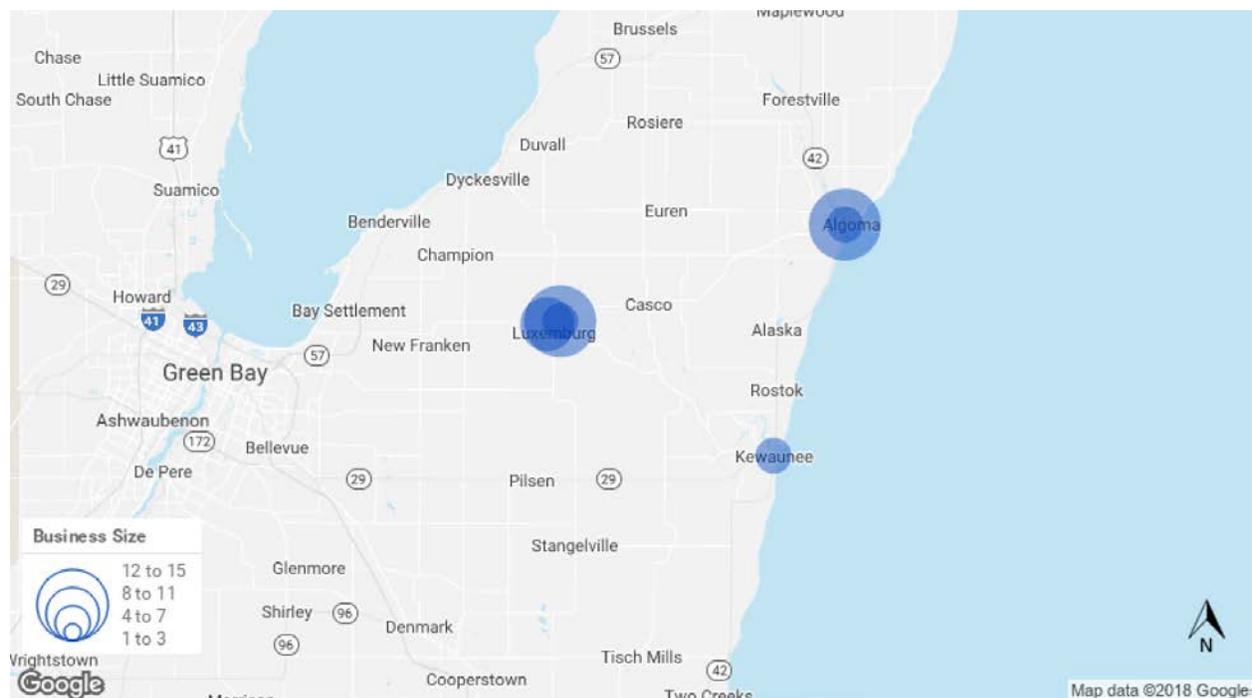
## Vehicle Parts Dealers

Vehicle parts dealers specialize in selling auto “aftermarket” parts. These can be replacement parts for vehicle repairs or accessories (such as seat covers) for cars and trucks. There are 3 vehicle parts dealers within a 10-minute drive of Kewaunee.

## Site Selection

Vehicle parts stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as the center point. Vehicle parts retailers looking to establish a business location in Kewaunee can see where competitors are already located (Figure 3).

Figure 3. Map of Vehicle Parts Stores Within a Ten-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 4. Potential for Auto Parts Stores in Kewaunee County



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

### Top Retailers in This Category

#### Retailer Profile

AutoZone has 5,006 locations across the United States and builds stores that are 6,800 to 7,300 square feet in size. They choose locations that are an in-line, end cap, or freestanding building located in either a strip center or community and neighborhood area. In 2016, AutoZone had over \$10 billion in sales.

#### Business Listings

Business Name	NAICS	Industry Name
Napa Auto Parts	441310	Automotive Parts and Accessories
Bobs Auto Parts	441310	Automotive Parts and Accessories
Nick's Auto Parts	441310	Automotive Parts and Accessories

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

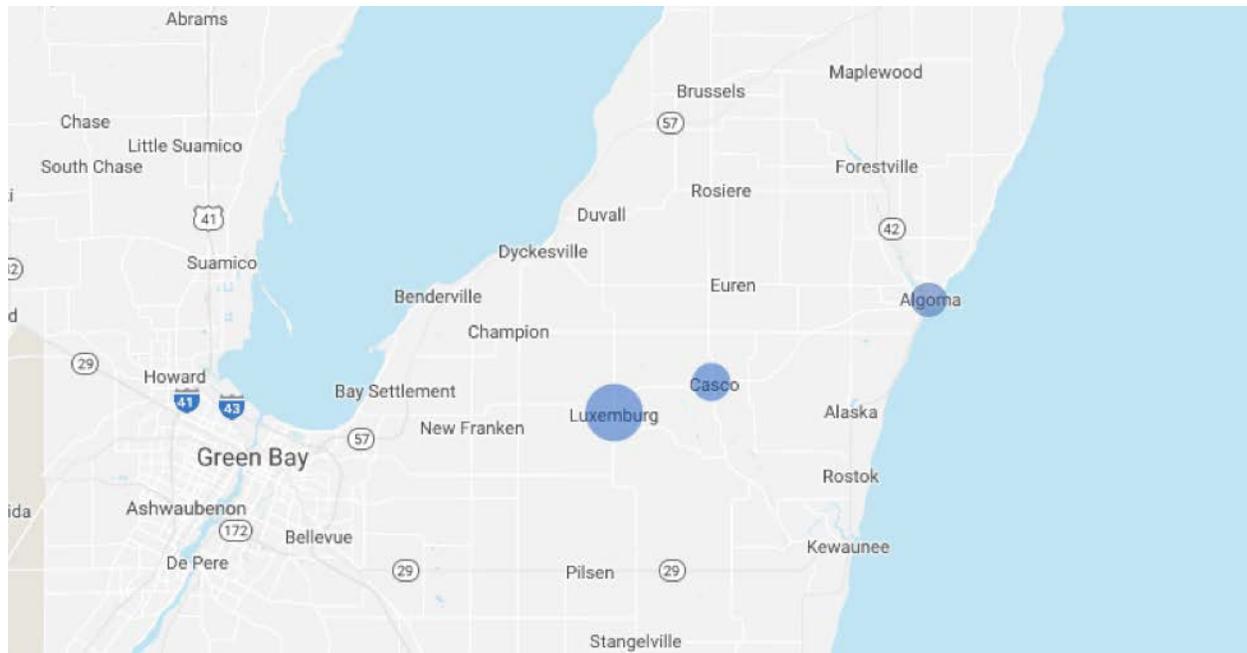
## Furniture and Home Furnishings

Furniture and home furnishings stores specialize in selling a variety of home goods ranging from cookware to new furniture. These stores usually operate from showrooms and have substantial areas for the presentation of their products. Many offer interior decorating services in addition to the sale of products. Average per store sales fall in the range of \$1.5 million to \$2.0 million. There are 3 furniture and home furnishing establishments within a 10-minute drive of Kewaunee which may adequately meet the demand in the area.

### Site Selection

Furniture and home furnishing retail stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as the center point. Furniture and home furnishing retail stores looking to establish a business location in Kewaunee can see where competitors are already located (Figure 5).

Figure 5. Map of Furniture and Home Furnishings Stores Within a Ten-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

### Top Retailers in This Category

The largest retail chains in the furniture industry include Ashley Furniture, Ikea, Williams-Sonoma (which operates Pottery Barn brands), Ethan Allen, Crate & Barrel, and several regional

chains. In Kewaunee County, the McMahons Furniture Company is the largest retailer, with estimated annual sales at \$2 million.

### Retailer Profiles

Ikea, one of the fastest-growing furniture retailers, operates more than 40 stores in the U.S. with several more slated to open in 2017. Within the chain, store sizes vary considerably, from 300,000 square feet to more than double that. Worldwide, average store sales are about \$100 million per year. Corporate revenues are growing about 7% per year. As a comparison, the Walmart Company is about 12 times larger than Ikea.

Cost Plus World Market has 260 worldwide locations. They build new stores to be freestanding buildings with 18,000 square feet; World Market siting criteria include locating near other big box retailers, and in a power location or in a community/neighborhood area. Cost Plus World Market's parent company, Bed Bath & Beyond, had just over \$11.6 billion in sales last year.

### Business Listings

Business Name	NAICS	Industry Name
Mc Mahons Furniture of Luxemburg	442110	Furniture Stores
Wiesner & Massart Furniture (x2)	442110	Furniture Stores

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

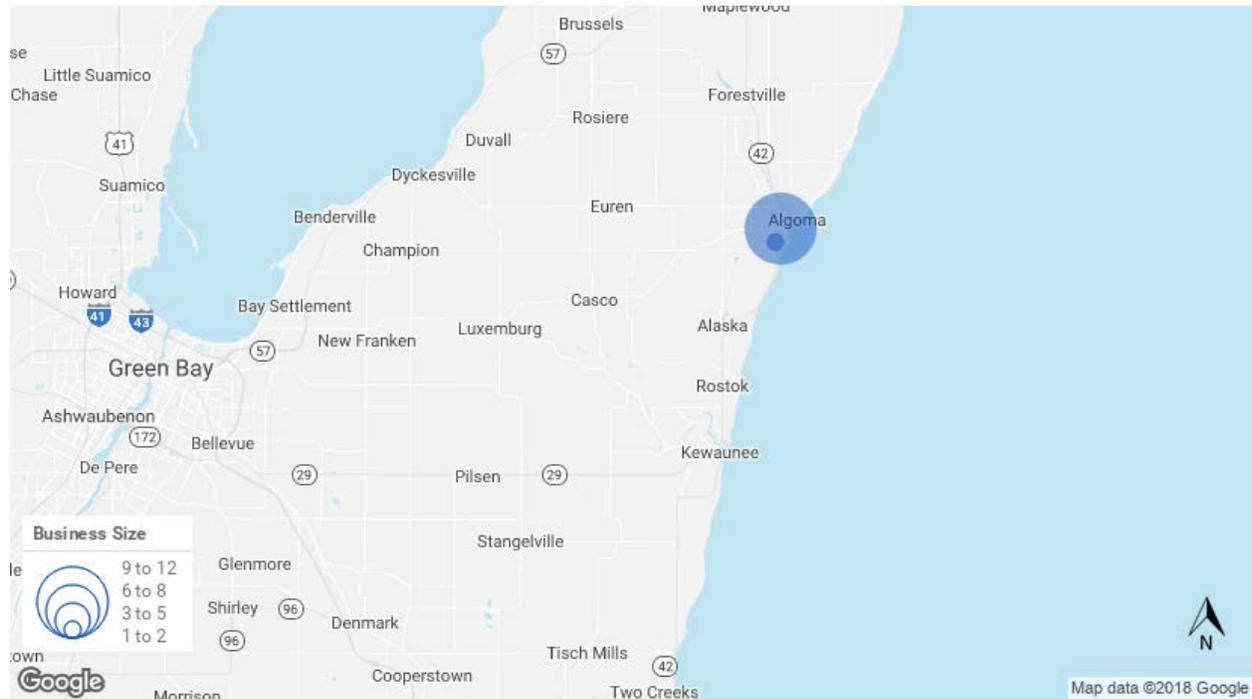
### Electronics and Appliances

The electronics and appliance industry specializes in selling a variety of electronic goods ranging from phones to dishwashers and TVs. There are 2 electronics and appliance furnishing establishments within a five-minute drive of Kewaunee.

### Site Selection

Electronics and appliance stores use a five-minute drive time criterion for their site selection preferences. This study incorporated the five-minute drive time using a location in the heart of downtown Kewaunee as the center point. Electronics and appliance stores looking to establish a business location in Kewaunee can see where competitors are already located (Figure 6) and the number of establishments needed to meet regional demand (Figure 7).

Figure 6. Map of Electronics and Appliance Stores Within a Five-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 7. Potential for Electronics and Appliance Stores in Kewaunee County

2 Existing Stores



Potential for 3 Stores



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

### Top Retailers in This Category

Best Buy, Amazon, Game Stop, Apple Stores, AT&T, and Verizon.

### Retailer Profile

Best Buy has over 3,000 worldwide locations. Best Buy has been closing and opening stores at almost equal rates over the last couple of years. Their strategy is focused on extreme cost-

cutting. Locations that are now too large or not selling at high volumes are being closed, while new stores may be opened at higher traffic locations nearby. Best Buy had over \$39 billion in sales last year.

### Business Listings

Business Name	NAICS	Industry Name
J&B Tv Appliance	443141	Household Appliance Stores
Ez Computers	443142	Electronics Stores

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

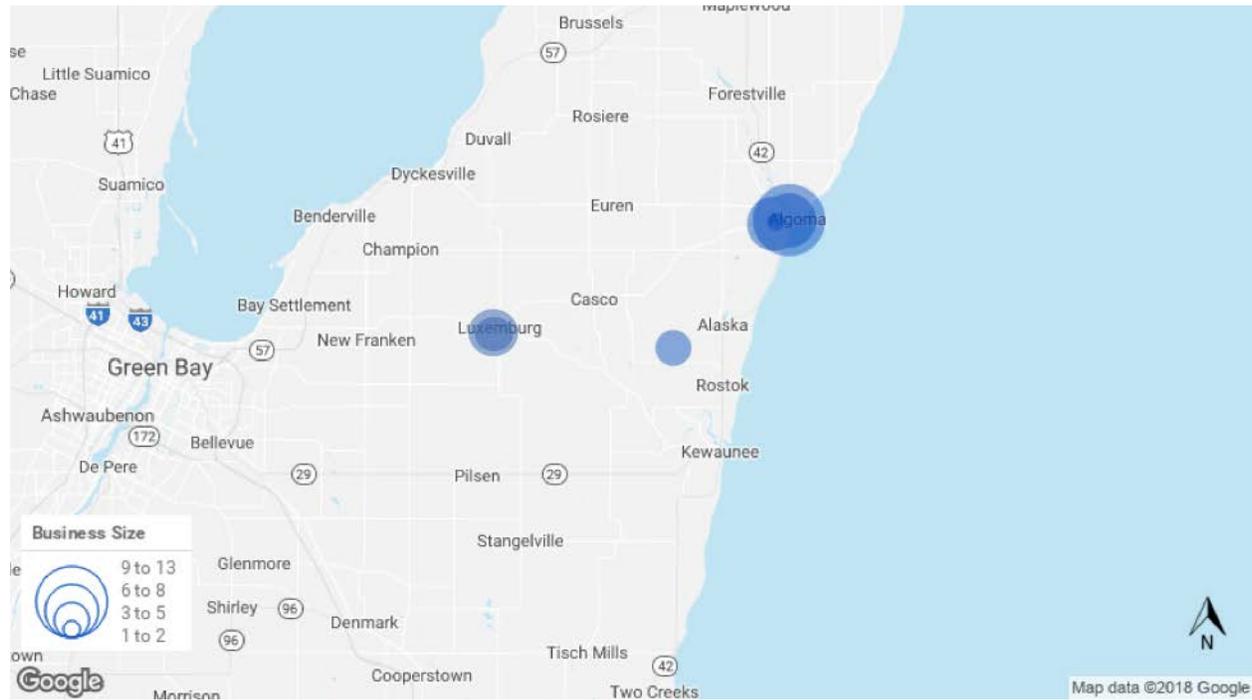
### Building Material, Garden Equipment, Supplies

Building material, garden equipment, supplies stores sell garden and building supplies ranging from garden rakes and shovels to lumber and power tools. There are 5 building material, garden equipment, and supplies establishments within a 10-minute drive of Kewaunee.

### Site Selection

Building material, garden equipment, supplies retail stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as its center point. Building material, garden equipment, supplies retail stores looking to establish a business location in Kewaunee can see where locations are already located (Figure 8) and the number of establishments needed to meet regional demand (Figure 9).

Figure 8. Building Material, Garden Equipment, Supplies Stores Within a Ten-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 9. Potential for Building Material, Garden Equipment, Supplies Stores in Kewaunee County



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Lowes, Home Depot, Do it Best, Sherwin Williams, JELD-WEN, and PPG Industries.

## Retailer Profile

Home Depot has 2,274 worldwide locations. They build stores in areas that have 50,000 people living in the immediate trade area. Their site criteria include that the location is a 10-acre site and will be a freestanding power location. Home Depot had over \$88 billion in sales last year. Home Depot, Lowes, and Menards are not likely to cite a store in Kewaunee, however, if a locally owned and operated hardware store/garden center opened, data shows the demand could support it.

## Business Listings

Business Name	NAICS	Industry Name
Algoma Hardware	444130	Hardware Stores
Walters How-to Hardware	444130	Hardware Stores
Algoma Hardwoods	444110	Home Centers
True Value Hardware	444130	Hardware Stores
Lemons Hardware	444130	Hardware Stores
Jerabek Edwin	444130	Hardware Stores

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

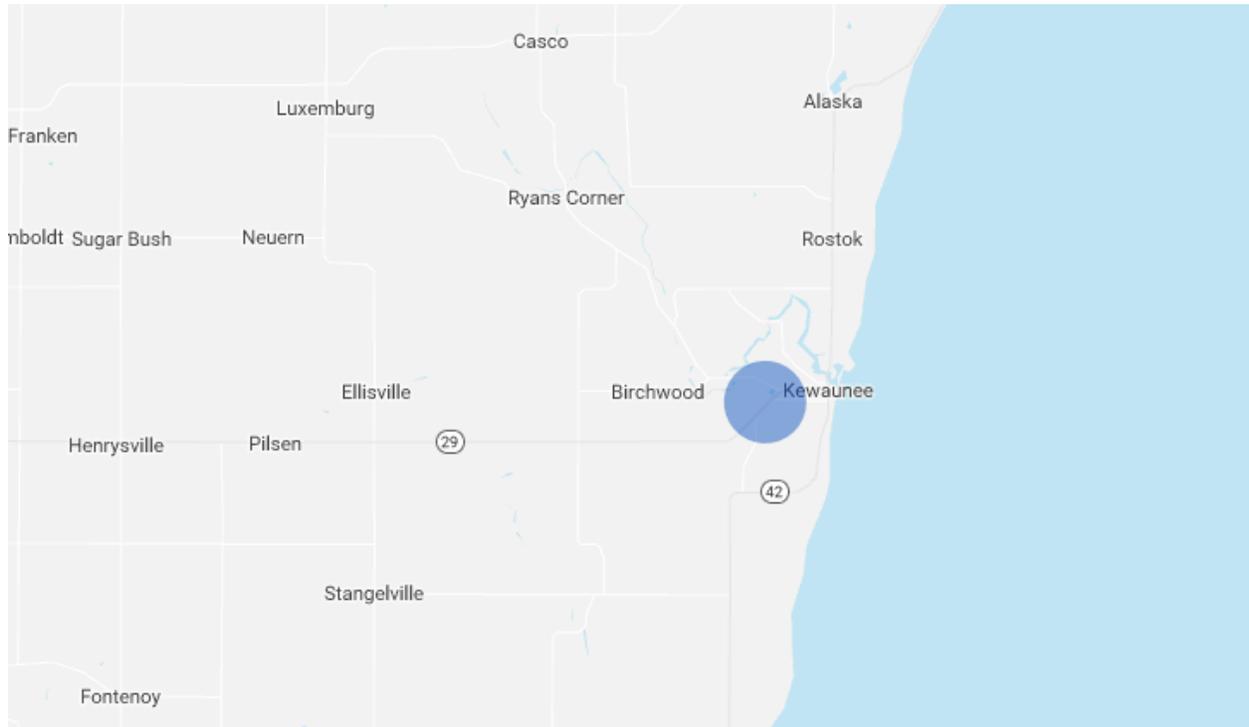
## Food and Beverage Stores

Food and beverage stores sell edible goods for both in-store and out-of-store consumption. This discussion includes specialty food stores, liquor stores, grocery stores, and other food-related stores. There is one store within a three-minute drive of downtown Kewaunee.

## Site Selection

Food and beverage stores use a three-minute drive time criterion for their site selection preferences. This study incorporated the three-minute drive time using a location in the heart of downtown Kewaunee as the center point. Food and beverage stores looking to establish a business location in Kewaunee can see where competitors are already located (Figure 10) and the number of establishments needed to meet regional demand (Figure 11).

Figure 10. Map of Food and Beverage Stores Within a Three-Minute Drive of Kewaunee



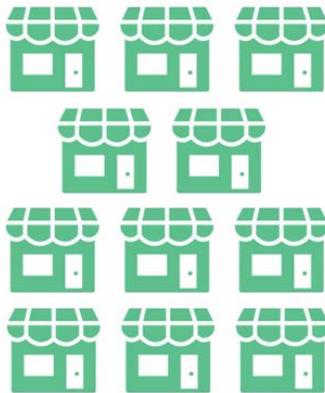
Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 11. Potential for Food and Beverage Stores in Kewaunee County

1 Existing Store



Potential for 11 Stores



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

## Top Retailers in This Category

Walmart, WinCo, Costco, Fred Meyer, Giant, Whole Foods, and Safeway are a few of many large nationwide retailers in this category.

## Retailer Profile

Walmart has over 5,000 worldwide locations. When choosing store locations, Walmart focuses on logistics and minimizing shipping costs. The number of people and the local GRP are considered, but logistics are the priority. Walmart sales were over \$481 billion last year. Although it is not likely eleven food and beverage stores will open in Kewaunee, data suggests there is opportunity in this category. Local meat/fish, bakery, organic or other specialty food stores done well could become a draw for the region and benefit from the demand identified in this report.

## Business Listings

Business Name	NAICS	Industry Name
Piggly Wiggly	445110	Supermarkets and Other Grocery (except Conv.) Stores

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

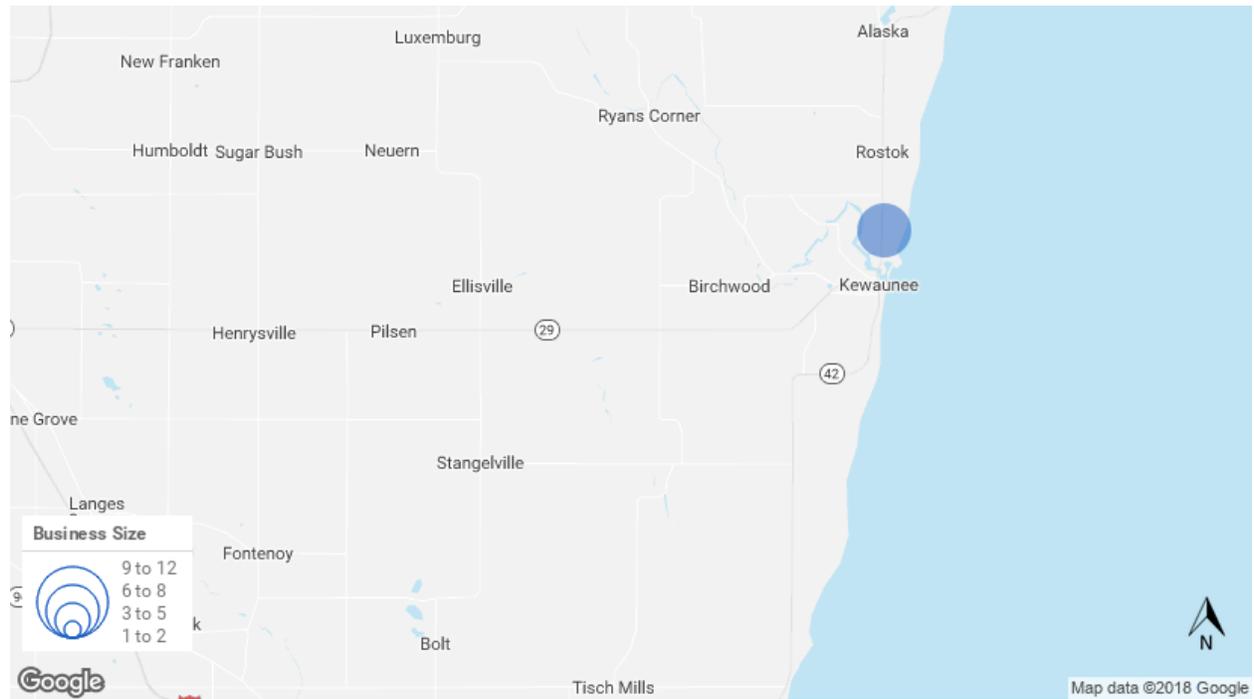
## Health and Personal Care Stores

Health and personal care retailers sell products such hair care and personal hygiene products. Most stores also offer a pharmacy. There is one health and personal care retail location at ShopKo within a three-minute drive of Kewaunee.

## Site Selection

Health and personal care stores use a three-minute drive time criterion for their site selection preferences. This study incorporated the three-minute drive time using a location in the heart of downtown Kewaunee as the center point. Health and personal care stores looking to establish a business location in Kewaunee can see where competitors are already located (Figure 12) and the number of establishments needed to meet regional demand (Figure 13).

Figure 12. Health and Personal Care Stores Within a Three-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 13. Potential for Health and Personal Care Stores in Kewaunee County

1 Existing Store



Potential for 6 Stores



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Walgreens, Rite Aid, CVS Pharmacy.

## Retailer Profile

CVS Pharmacy has 9,600 worldwide locations. New locations should have at least 15,000 people residing within a one-mile radius. New stores are built to be between 12,000 and 15,000 square feet and are built as freestanding locations. The CVS Pharmacy parent company, CVS Health, sold over \$177 billion last year. Regarding this category, it is one which has seen significant competition from online retailers and it is expected to continue to grow.

## Business Listings

Business Name	NAICS	Industry Name
Shopko Pharmacy	446110	Pharmacies and Drug Stores

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

## Gas Stations with Convenience Stores

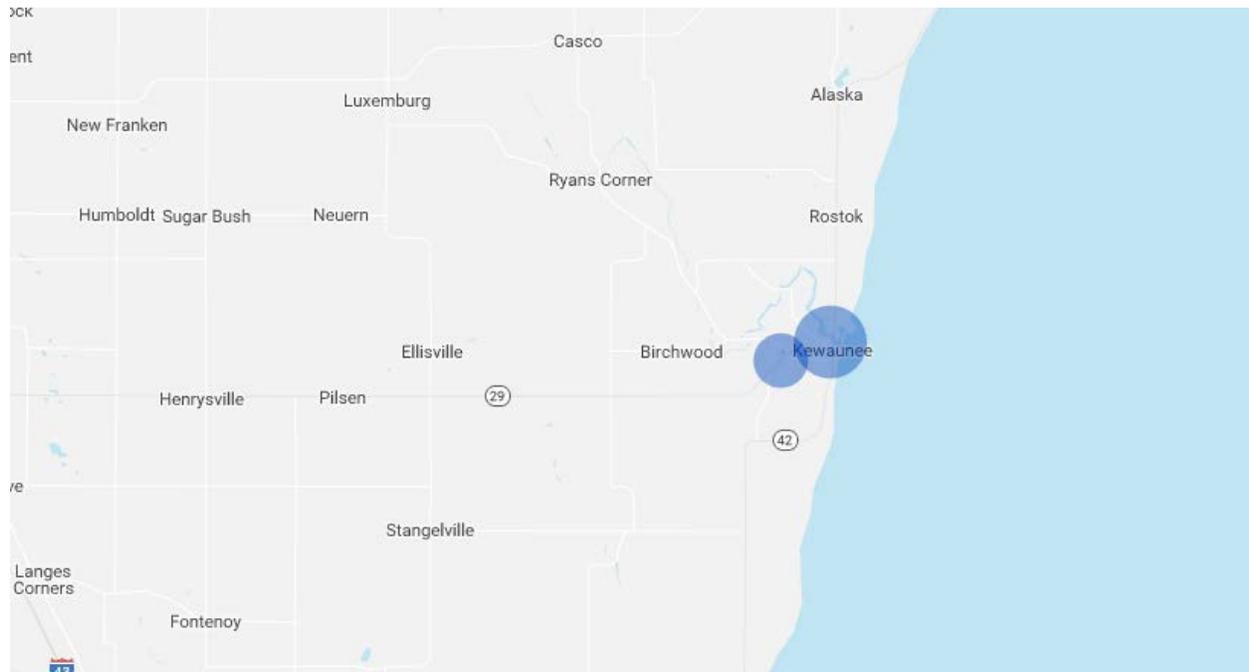
While gas stations and convenience stores are considered to be separate kinds of businesses, for this analysis, we are discussing only those gas stations with convenience stores combined. These stores may also sell liquor. These establishments may also provide ancillary services such as carwashes or auto repair.

Average per store sales fall in the range of \$2.5 million to \$4.0 million. Across the country, most gas sales (about 80%) are sold by convenience store/gas stations. There are 2 gas and convenience stores within a 5-minute drive of Kewaunee.

## Site Selection

Gas stations and convenience stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 5- to 10-minute drive time. This study incorporated a 5-minute drive time using a location in the heart of downtown Kewaunee as the center point. Gas station/convenience stores looking to establish a business location in Kewaunee can see where competitors are already located (Figure 14) and the number of establishments needed to meet regional demand (Figure 15).

Figure 14. Gas Stations with Convenience Stores Within a 5-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 15. Potential for Gas Stations with Convenience Stores in Kewaunee County

2 Existing Stores



Potential for 4 Stores



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

### Business Listings

Business Name	NAICS	Industry Name
Harbor Express	445120	Convenience Stores
Center Court Convenience	445120	Convenience Stores

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

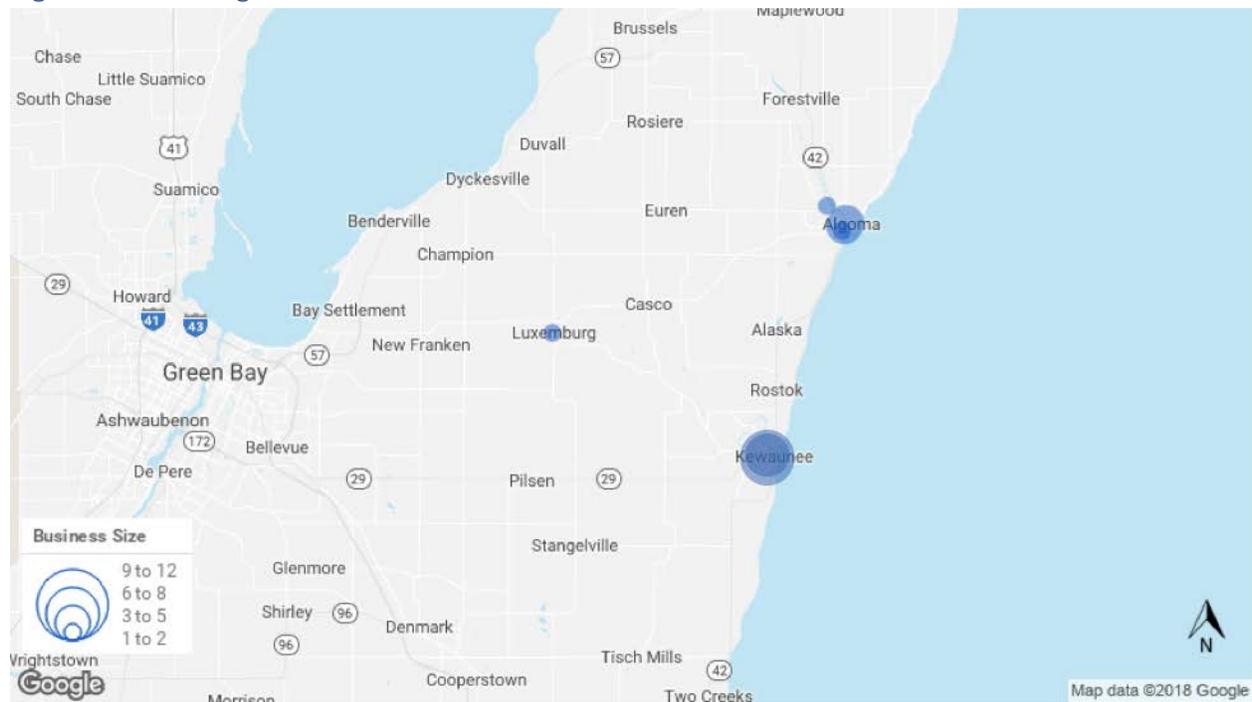
## Clothing and Accessories

Clothing and accessories retailers specialize in selling men’s, women’s, and children’s apparel, shoes, and accessories. There are 7 clothing and accessories stores within a 10-minute drive of Kewaunee.

### Site Selection

Clothing and accessories stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as the center point. Clothing and accessories retailers looking to establish a business location in Kewaunee can see where competitors are already located (Figure 16) and the number of establishments needed to meet regional demand (Figure 17).

Figure 16. Clothing and Accessories Stores Within a Ten-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 17. Potential for Clothing and Accessories Stores in Kewaunee County



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

### Top Retailers in This Category

Gap Inc., Amazon, H&M, Sketchers, ROSS, North Face, Lululemon, and Maurices.

### Retailer Profile

Gap Inc. includes the retailers GAP, Banana Republic, Old Navy, Intermix, Piperlime, and Athletica. Gap Inc. owns almost 3,700 worldwide locations. Gap Inc. had just over \$15.5 billion in sales last year. A large part of the shopping experience for clothing is less utilitarian and more of an event, so shoppers often travel to regional malls to shop for clothes. Online clothing shopping is also aggressively filling gaps in local clothing shopping opportunities.

### Business Listings

Business Name	NAICS	Industry Name
Kohlbecks Clothing	448140	Family Clothing Stores
Shopko	448140	Family Clothing Stores
Pretty Please Boutique	448120	Women's Clothing Stores
Tina Maries Boutique	448120	Women's Clothing Stores
Lisa's Alterations	448190	Other Clothing Stores
Corporate Apparel	448150	Clothing Accessories Stores
Kays Kreations	448190	Other Clothing Stores

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

## Sporting Goods, Hobby, Musical Instrument, and Book Stores

The sporting goods, hobby, musical instrument, or book retail industry specializes in selling athletic goods, recreational goods, instruments and music supplies, and new and used books. There are no sporting goods, hobby, musical instrument, or book retail establishments within a 10-minute drive of Kewaunee.

### Site Selection

Sporting goods, hobby, musical instrument, or book retailers use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as the center point. An estimated three establishments are needed to meet regional demand (Figure 18).

Figure 18. Potential for Sporting Goods, Hobby, Musical Instrument, and Book Stores in Kewaunee County

0 Existing Stores

Potential for 3 Stores



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

### Top Retailers in This Category

Dicks Sporting Goods, Sports Authority, Amazon, Barnes & Noble, Pro Image, Cabela’s, Bass Pro Shop, and Big 5.

### Retailer Profile

Dicks Sporting Goods has 610 worldwide locations and prefers that their new locations be in a region where the median household income is at least \$70,000. They build new stores with a space of 50,000 square feet. Preferred store locations are situated as an in-line, mall, end cap or power location. Dicks Sporting Goods had just over \$7 billion in sales last year.

### Business Listings

NONE

## Miscellaneous and General Retail

Miscellaneous and general retail stores sell a wide range of goods. In and near Kewaunee, the key types of retailers captured in this general category include outlet stores, florists, novelty items, used clothes, pet supplies, and office supplies. There are 6 miscellaneous retail establishments within a 10-minute drive of Kewaunee. These types of stores tend to be small, which is one reason why the number of stores that could be supported in Kewaunee is high. However, the other reason is that this category includes department stores traditionally found in malls, such as Macy's or Sears. Sales for department stores are very high, and the demand shown for the Kewaunee area likely includes traditional department store spending.

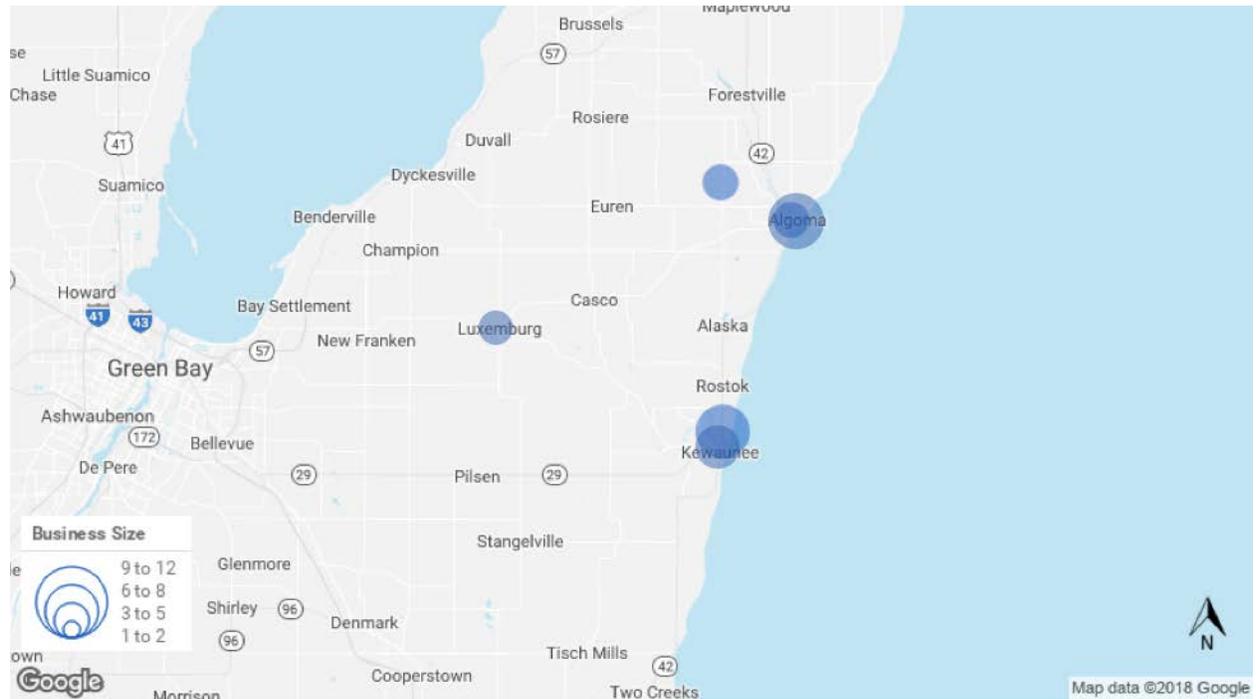
Department stores, however, are the one category that are in the sharpest decline of all retail types. The trend nationwide has been that traditional consumer spending that once went to department stores is now going to smaller specialty and niche stores, but also to e-commerce. However, not all traditional consumer spending is being redirected to retail. Spending on clothing has declined sharply, and spending on consumer experiences such as travel, and fine dining has risen.

While strictly going by traditional demand estimates to arrive at a potential for up to 31 miscellaneous or general stores in the Kewaunee area, these factors have not been examined based on new consumer spending estimates. The local market can most likely support many new niche stores, but the final number may be less than 31, while more service-oriented businesses, such as outdoor recreational businesses, might better fill some of this gap.

### Site Selection

Miscellaneous retail stores use an "immediate trade area" criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Kewaunee as the center point. Miscellaneous retail stores looking to establish a business location in Kewaunee can see where competitors are already located (Figure 19) and the number of establishments needed to meet regional demand (Figure 20).

Figure 19. Miscellaneous Retail Stores Within a Ten-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

Figure 20. Potential for General Stores in Kewaunee County



Sources: Emsi 2018.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

## Top Retailers in This Category

Goodwill, Salvation Army, PetSmart, Office Depot, Staples, and outlet stores.

## Retailer Profile

Staples has 3,856 worldwide locations. Staples had just over \$18 billion in sales last year.

## Business Listings

Business Name	NAICS	Industry Name
Svoboda Industries	453998	All Other Miscellaneous Store Retailers (except Tobacco)
Clay On Steel	453998	All Other Miscellaneous Store Retailers (except Tobacco)
Birds & Beyond	453998	All Other Miscellaneous Store Retailers (except Tobacco)
Dollar General	453998	All Other Miscellaneous Store Retailers (except Tobacco)
Family Dollar (2)	453998	All Other Miscellaneous Store Retailers (except Tobacco)

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

## Wholesale and Distribution

Kewaunee County has a thriving wholesale and distribution industry. Even with substantial activity, the location quotient, an indicator of relative concentration and specialization, is low. The conclusions from this is that the wholesale businesses in Kewaunee are well positioned to support retail growth in the county. Additionally, there appears to be sufficient need to accommodate new wholesale businesses in the county. In other words, there is enough activity to have expertise, capacity, and market. But concentration is low enough to leave room for more growth.

Description	2017 Purchases by Kewaunee County Residents or Businesses in Kewaunee	2017 Purchases by Kewaunee County Residents or Businesses Outside of Kewaunee	2017 Purchases by Visitors/Outside Businesses from Kewaunee Businesses	2017 Cost of Goods Sold	2017 Estimated Potential Demand in Kewaunee
Merchant Wholesalers, Durable Goods	\$5,828,271	\$51,250,847	\$8,680,151	\$19,727,781	\$85,487,049
Merchant Wholesalers, Nondurable Goods	\$4,401,395	\$31,740,773	\$10,837,476	\$14,093,893	\$61,073,538
Wholesale Electronic Markets and Agents and Broker	\$628,027	\$22,267,335	\$158,618	\$6,916,194	\$29,970,175
Wholesale Trade Total	\$10,857,693	\$105,258,955	\$19,676,246	\$40,737,868	\$176,530,762

Description	2017 Payrolled Business Locations	2017 Jobs	Post Recession % Change in Jobs	2017 Location Quotient	Avg. Earnings Per Job
Merchant Wholesalers, Durable Goods	10	53	(5%)	0.31	\$61,902
Merchant Wholesalers, Nondurable Goods	8	84	42%	0.70	\$47,361
Wholesale Electronic Markets and Agents and Broker	4	1	0%	0.02	\$96,038
Wholesale Trade Total	22	138	19%	0.40	\$53,299

Sources: Emsi 2018.1 dataset.

## Amusement and Recreation Industries

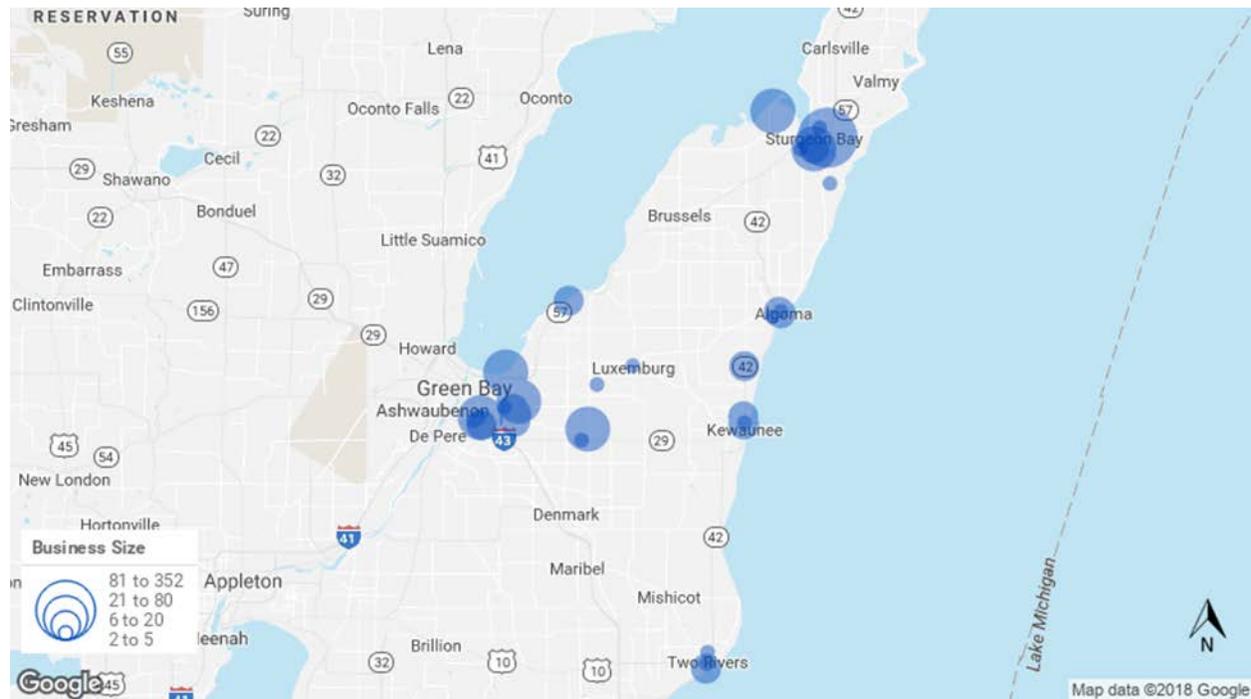
This category of stores includes retail and service providers across a wide range of arts, cultural activities, entertainment, and recreation businesses. Because of the huge variety of establishments, average income per type of store is less useful than for the retail sectors reviewed above. In general, there is an estimated \$24 million currently spent in Kewaunee County on recreation, at an estimated 33 establishments. This is \$700,000 in sales per establishment, while Census data suggests that average sales per recreation or entertainment establishment is about \$1.5 million.

While current spending might indicate more competition in this sector than for many other retail or service sectors in Kewaunee, the area does seem to be capturing less tourism and recreation-related spending than expected. This is a sector that does seem to have potential for growth in the county, but investment should be carefully investigated, with adequate due diligence paid to the type of establishment and the expected competition both locally and in Door County. Significantly, there are no recreational or sporting goods rental centers located in Kewaunee County. With the trails for biking or skiing, as well as boating, snorkeling, kayaking, and canoeing options, outdoor sporting equipment rental stores should be considered for development.

### Site Selection

This study incorporated a 30-minute drive time using a location in the heart of downtown Kewaunee as the center point. Entertainment or recreation businesses looking to establish a business location in Kewaunee can see where competitors are already located (Figure 21).

Figure 21. Amusement and Recreation Industries Within a Thirty-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

### Business Listings

Business Name	NAICS	Industry Name
27 Pines Golf Course	713910	Golf Courses and Country Clubs
Alaskan Golf Club N	713910	Golf Courses and Country Clubs
Emerald Hills Golf Course	713910	Golf Courses and Country Clubs
Harbor Club	713910	Golf Courses and Country Clubs
Idlewild Golf Course	713910	Golf Courses and Country Clubs
Northbrook Golf Course	713910	Golf Courses and Country Clubs
Shorewood Golf Course	713910	Golf Courses and Country Clubs
Woods Golf Club	713910	Golf Courses and Country Clubs
Captain K's Landing	713930	Marinas
City Of Algoma	713930	Marinas
Kewaunee Marina	713930	Marinas
Quarter Deck Marina	713930	Marinas
Salmon Harbor Marina Llc	713930	Marinas
Sunrise Cove Marina	713930	Marinas
Twin Cities Marine Inc	713930	Marinas

Aegis Aesthetics	713940	Fitness and Recreational Sports Centers
Anytime Fitness (3)	713940	Fitness and Recreational Sports Centers
Bellin Health Fitness Center	713940	Fitness and Recreational Sports Centers
Door County YMCA	713940	Fitness and Recreational Sports Centers
Family Shooting Academy	713940	Fitness and Recreational Sports Centers
Fitnessology	713940	Fitness and Recreational Sports Centers
Kewaunee Health & Fitness	713940	Fitness and Recreational Sports Centers
Algoma Pizza Bowl	713950	Bowling Centers
Czs Bushville Lanes Llc	713950	Bowling Centers
Kewaunee Bowl	713950	Bowling Centers
Knuckleheads	713950	Bowling Centers
Luxemburg Bowl	713950	Bowling Centers
Rudys Lanes	713950	Bowling Centers
Willow Creek Bowling Lanes	713950	Bowling Centers
Hunters Edge	713990	All Other Amusement and Recreation
Ice Fishn Magician	713990	All Other Amusement and Recreation
Meadows Banquet & Catering	713990	All Other Amusement and Recreation
Shippa Hoy	713990	All Other Amusement and Recreation

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

## Kayak and Bike Rentals

Based on the data surrounding transportation earlier in this report, and the local assets of Lake Michigan and the Ahnapee State Trail, a small business that rents kayaks, paddle boards, bicycles, cross country skis and other transportation related outdoor equipment would be a solid addition to the local economy. Offering guided kayak, paddleboard or cross-country ski tours of the coastline/trail or creating other event type attractions provides visitors with some structure, while other adventurers will want to explore on their own. Reusing an existing small building near the lake would facilitate redevelopment as well as provide an affordable location for a startup business. If a new commercial facility was to be constructed on City-owned property, a small space for this type of business could also be included. Rents will need to be affordable and this business will need a solid marketing plan in place. The site identified at Ahnapee Landing would be ideal due to its river/lake access and proximity to the Ahnapee Trail.

Combining all outdoor recreational equipment for rent in one business and facility make the most sense to provide four-season market access and plant seeds in visitors' minds to come back again in a few months to continue making fond memories in Kewaunee.



## Traveler Accommodations

Kewaunee tourism dollars are 5% of Door County tourism business, which was quite an unexpected finding. This seems to indicate considerable opportunity for Kewaunee to encourage more tourism. Capturing more of this activity could come through varied levels of effort and investment. It could come through an aggressive marketing campaign, an effort to promote the hotels and motels already present and ensuring that the city center and shoreline are attractive with interesting and useful businesses. Also, City leaders and individuals developing a marketing effort should tour existing lodging facilities to ensure rooms and service features will provide a pleasant tourist experience.

For hotels, location is everything. For building new hotel capacity, proximity to conference centers and other hotels is a common site selection criterion, especially by larger chains. However, demographic and workforce studies are important, because hospitality depends on both highly trained employees and requires many lower-paid workers (such as cleaning staff). Worker availability and local training capacity, therefore, are important considerations. The hotel management firm Xotels encourages their clients to study the revenue growth of similar style hotels in the area to see if the market is worth entering, and offers these considerations:

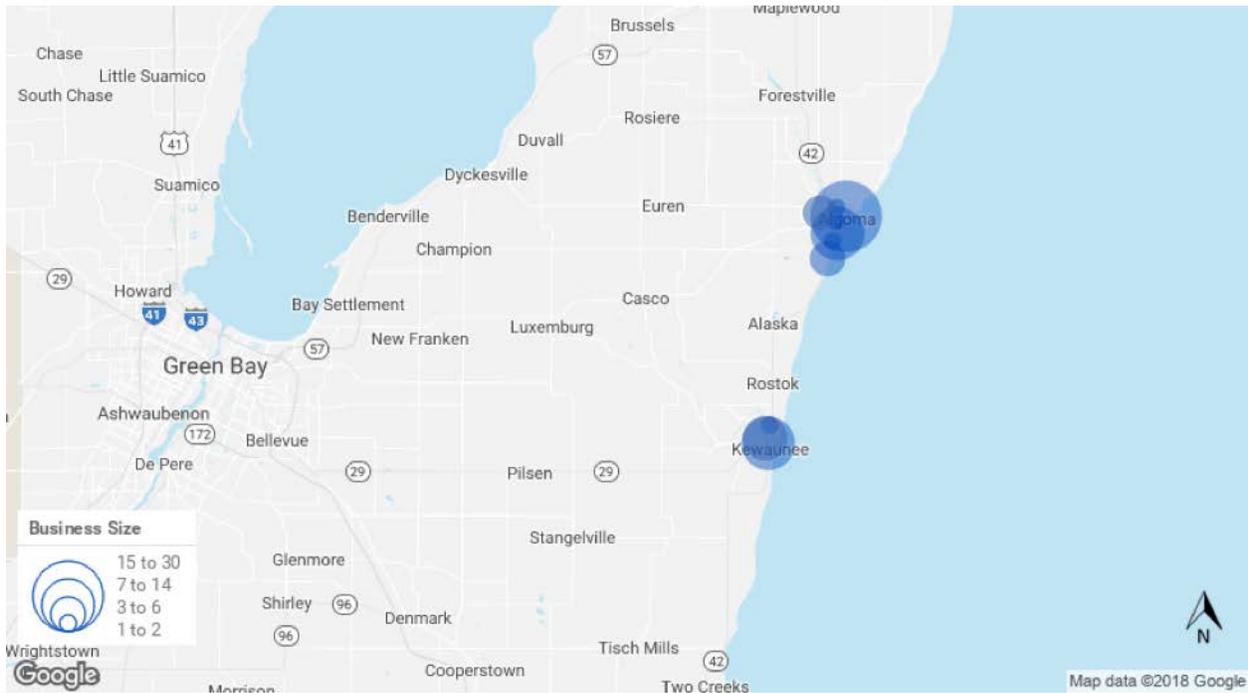
*“What creates the demand in your market? Why do travelers come to your destination? What is the motive of their trip? Where are they coming from, or rather, what are you feeder markets?”*

There are 10 hotels or motels within a 15-minute drive of Kewaunee.

## Site Selection

This study incorporated a 15-minute drive time using a location in the heart of downtown Kewaunee as the center point. Hotels interested in establishing a business location in Kewaunee can see where competitors are already located (Figure 22). While Census estimates show average annual receipts of \$3 million per hotel, these figures include primarily larger chains (up to 87% of total hotel revenues), which have significantly greater annual sales volumes than smaller, locally-owned hotels or bed and breakfast inns. According to IBISWorld, smaller hotels, motels, and bed and breakfast establishments have annual revenues of about \$500,000. With this estimate, the area can support nearly 40 motels or BNBs. There are less than a dozen Airbnb accommodations advertised in the area. Prices for these Airbnb rooms or homes are equal (at \$70 and higher) to prices charged in major metropolitan areas – another indicator of tight capacity for accommodations in the area and potential for new hotel or motel space.

Figure 22. Traveler Accommodations Within a Fifteen-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

### Business Listings

Business Name	NAICS	Industry Name
Harbor Inn Motel	721110	Hotels (except Casinos) and Motels
Harbor Lights Lodge	721110	Hotels (except Casinos) and Motels
Algoma Beach Motel	721110	Hotels (except Casinos) and Motels
Karsten Hotel	721110	Hotels (except Casinos) and Motels
Hotel Stebbins	721110	Hotels (except Casinos) and Motels
At the Water's Edge	721191	Bed-and-Breakfast Inns
River Hills Motel	721110	Hotels (except Casinos) and Motels
Coho Motel	721110	Hotels (except Casinos) and Motels
Scenic Shore Inn	721110	Hotels (except Casinos) and Motels
Belle Isle Inn	721110	Hotels (except Casinos) and Motels

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

## A New Hotel in Kewaunee

As noted above in the market data segment of this report, there are eight hotels within a 15-minute drive time from Kewaunee. The data indicates the area could support up to 40 motels or Bed and Breakfast-type establishments due to the demand for lodging as it exists today and as indicated by the rate Air BnB establishments are able to command for an overnight stay.

A new hotel would compete with the existing lodging facilities in the area initially, however it might also put pressure on them for updates and improvements which will provide more appealing supply as awareness of the amenities in the area increases.

Options for guests attending a wedding or other major event at Lakehaven Hall are limited to three local hotels, a small number of Bed and Breakfasts and some Home Away rentals totaling roughly 100 rooms collectively.

In conversation with one local hotel owner, hotels in the area are full nearly every weekend in the summer and early fall, but the business is very seasonal. Outreach to other hotel owners did not result in a conversation. A leader in hotel data worldwide, STR benchmarks markets and hotel properties against others in the industry and is often sought as a source of information to support hotel feasibility studies. Local hotels or tourism agencies must report their data to STR for it to be included in the benchmarking reports. None of the local hotels report to this agency so a STR report was not available to aid in the determination of feasibility for Kewaunee.

Noting the over \$4 million in demand potential for Kewaunee Traveler Accommodations in Table 1 on page 8, and the estimated number of new businesses showing potential in Table 2 on page 9, it is this consultant's opinion that a new hotel is feasible, however, a free-standing boutique hotel may be more successful in two to five years when more of a tourism draw to the area has been established. The property should be of a moderate size with mid-to-upper end average daily rates, in the \$129-\$159 per night range. If the hotel has a destination bar/restaurant or spa and is sized right for its location, the hotel, in and of itself could be a draw to visitors. Critical to a boutique hotel's success is management, its uniqueness and how well it takes advantage of the property's location and history. A unique lodging experience which makes the lakefront experience part of its offering would serve the visitors but also the local economy, if done well.

If the opportunity to construct bungalow type vacation rentals is of interest to a developer (as imagined in the lakefront design plan drafted by UW Extension) these should be phased in and designed with a very strong marketing strategy in place.

In addition to attracting a new hotel to Kewaunee, attention should be paid to existing properties if owners are willing to make investments. Reviews on-line are not all that favorable for some properties. Encourage owners to upgrade amenities such as provide new bedspreads, blankets, pillows, light fixtures, in-room furniture, art packages and curtains.



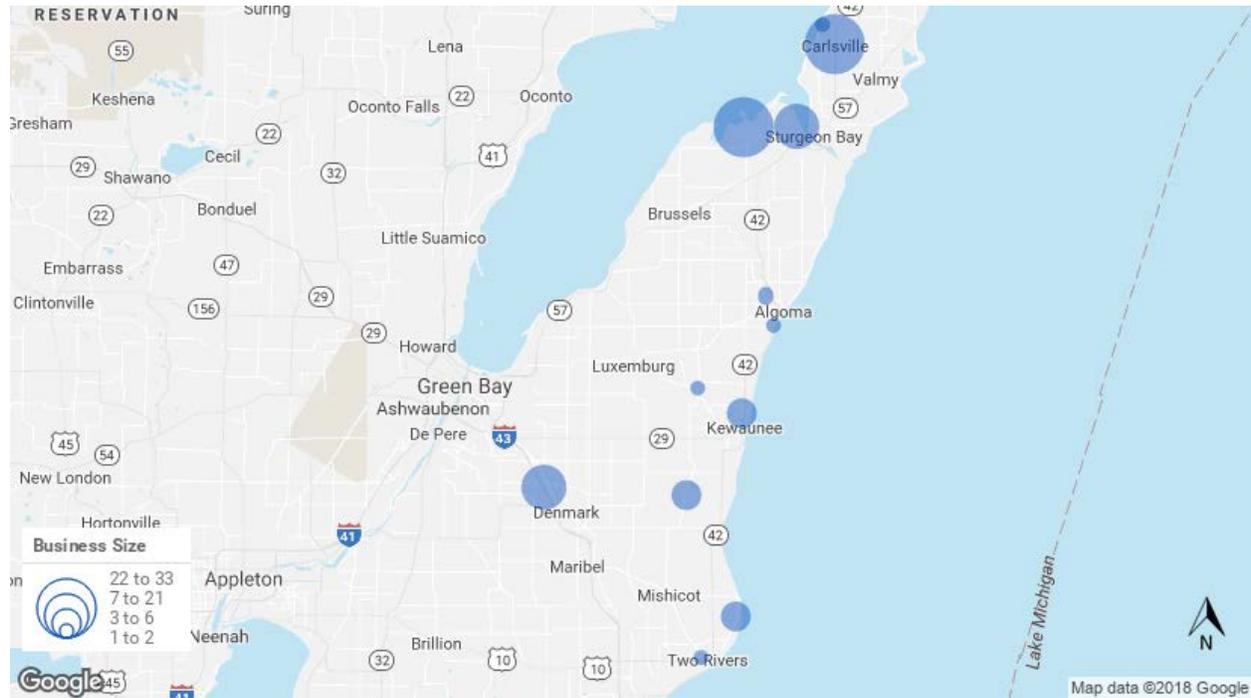
## RV Parks

A recreational vehicle park (RV park) is a place for RV camping. In addition, this section considers a variety of campgrounds. Parks considered here may be publicly owned, such as in state or city parks, or privately held enterprises. These parks may have tent camping, RV camping, and cabins. RV parks and campgrounds can provide several services, including Wi-Fi, electrical and water hookups, laundry facilities, showers, and recreation activities. There are 12 RV parks or campgrounds within a 30-minute drive of Kewaunee.

## Site Selection

This study incorporated a 30-minute drive time using a location in the heart of downtown Kewaunee as the center point. RV parks or campgrounds looking to establish a business location in Kewaunee can see where competitors are already located (Figure 23). Based on Census estimates of average annual receipts of \$700,000 per campground, the county should support about 5 such parks. The 30-minute drive time captures more than Kewaunee County, which explains the large number of RV parks and campgrounds in the greater region.

Figure 23. RV Parks Within a Thirty-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

### Business Listings

Business Name	NAICS	Industry Name
Harbour Village Resort	721211	RV Parks and Campgrounds
Yogi Bear's Jellystone Park	721211	RV Parks and Campgrounds
Tranquil Timbers	721211	RV Parks and Campgrounds
Shady Acres Campground	721211	RV Parks and Campgrounds
Mapleview Campsite	721211	RV Parks and Campgrounds
Kewaunee Village R V Park	721211	RV Parks and Campgrounds
Timber Trail Campgrounds	721211	RV Parks and Campgrounds
Monument Point Camping	721211	RV Parks and Campgrounds
Ahnapee River Trails Camp	721211	RV Parks and Campgrounds
Big Lake Campgrounds	721211	RV Parks and Campgrounds
Stop & Dock Marina	721211	RV Parks and Campgrounds
Cedar Valley Campgrounds	721211	RV Parks and Campgrounds

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

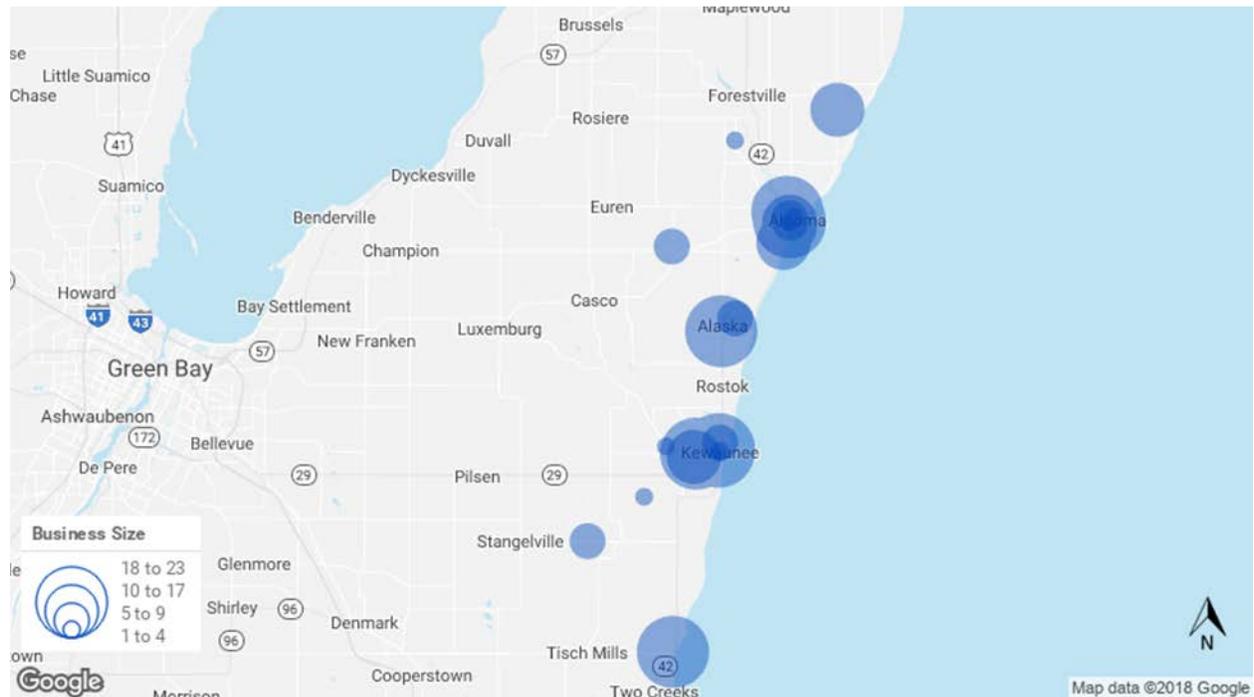
## Restaurants

Restaurants provide customers a variety of dining options; some of the categories are ethnic cuisine, American, fast food, fast casual, casual dining, fine dining, barbecue, buffets, cafes, bakeries, and cafeterias. There are 25 restaurants within a 10-minute drive of Kewaunee.

## Site Selection

Restaurants use a five-minute drive time criterion for their site selection preferences. This study incorporated the five-minute drive time using a location in the heart of downtown Kewaunee as the center point. Restaurants interested in establishing a business location in Kewaunee can see where competitors are already located (Figure 24). Based on Census estimates of average annual receipts of \$1.2 million per restaurant, the area should support about 15 full-scale restaurants.

Figure 24. Restaurants Within a Five-Minute Drive of Kewaunee



Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

## Top Retailers in This Category

McDonalds, Starbucks, Chick-Fil-A, Subway, Olive Garden, Red Lobster, Outback Steakhouse, Burger King, Taco Bell, Red Robin, Panda Express, Buffalo Wild Wings, and many more.

## Retailer Profile

Starbucks has 24,464 locations around the world. It had \$21.3 billion in sales last year. The company prefers a location of 2,000 square feet and that the location be either freestanding in a power or community/neighborhood area or in a strip center or mall.

## Business Listings

Business Name	NAICS	Industry Name
Port O Cal	722511	Full-Service Restaurants
Amy's Coffee House LLC	722511	Full-Service Restaurants
Fishtale Ale House	722511	Full-Service Restaurants
Jeff's Sports Bar Grill LLC	722511	Full-Service Restaurants
Gibs On Lake	722511	Full-Service Restaurants
Kunkel's Korner Restaurant	722511	Full-Service Restaurants
Off the Hook Coffee House & Cafe	722511	Full-Service Restaurants
China Moon	722511	Full-Service Restaurants
Ape's Bar & Grill	722511	Full-Service Restaurants
Subway	722511	Full-Service Restaurants
Cafe Tlazo	722511	Full-Service Restaurants
Dairy Deans Family Restaurant	722511	Full-Service Restaurants
Renard's Cheese	722511	Full-Service Restaurants
Subway	722511	Full-Service Restaurants
Skaliwags	722511	Full-Service Restaurants
Rock N Shore Pub	722511	Full-Service Restaurants
Moe's Place	722511	Full-Service Restaurants
Waterfront	722511	Full-Service Restaurants
North Water Bakery & Deli Home of Cake Designs	722511	Full-Service Restaurants
Algoma Pizza Bowl	722511	Full-Service Restaurants
Lake Effects Pub LLC	722511	Full-Service Restaurants
Roustabout Bar & Motel	722511	Full-Service Restaurants
Kewaunee Bowl	722511	Full-Service Restaurants
Koenig's Bar	722511	Full-Service Restaurants
Footbridge	722511	Full-Service Restaurants

Sources: Emsi 2018.1 dataset. DatabaseUSA.com.

## Micro-brewery / Brewpub

According to a 2009 article in the Wall Street Journal, 114 new microbreweries and brewpubs opened for business in 2008 despite the worldwide economic crisis. Beer sales nationwide rose

by 0.5 percent in the United States in 2008 but increased by 6 percent for craft beers. The Brewers Association reported that 350 new breweries opened in the United States between 2011 and 2012 and the number of independent breweries reached its highest point since the year 1887.

There were only 42 companies brewing beer in the United States in 1978, but by 2011 there were 2,000. This was the largest number of brewers in business at one time in the U.S. since the late 19th century -- and all but 50 of them were defined as craft beer brewers by the Brewers Association. Craft beer sales went up 15 percent in 2011, although the total share of the beer business held by craft brewers was still only 5 percent. This means that the 50 brewers not defined as craft brewers are still responsible for 95 percent of all beer sales in the U.S. The craft beer industry is a small but rapidly growing niche market (according to <http://smallbusiness.chron.com/analysis-microbrewing-industry-66125.html> ). Overall U.S. beer volume sales were down 1% in 2017, whereas craft brewer sales continued to grow at a rate of 5% by volume, reaching 12.7% of the U.S. beer market by volume. Craft production grew the most for microbreweries.

Retail dollar sales of craft increased 8%, up to \$26.0 billion, and now account for more than 23% of the \$111.4 billion U.S. beer market.

There are four distinct craft beer industry market segments: brewpubs, microbreweries, regional craft breweries and contract brewing companies (<https://www.brewersassociation.org/statistics/market-segments/> ).

**Microbrewery:** A brewery that produces less than 15,000 barrels (17,600 hectoliters) of beer per year with 75 percent or more of its beer sold off-site. Microbreweries sell to the public by one or more of the following methods: the traditional three-tier system (brewer to wholesaler to retailer to consumer); the two-tier system (brewer acting as wholesaler to retailer to consumer); and, directly to the consumer through carry-outs and/or on-site tap-room or restaurant sales.

**Brewpub:** A restaurant-brewery that sells 25 percent or more of its beer on site. The beer is brewed primarily for sale in the restaurant and bar. The beer is often dispensed directly from the brewery's storage tanks. Where allowed by law, brewpubs often sell beer "to go" and /or distribute to offsite accounts.

**Contract Brewing Company:** A business that hires another brewery to produce its beer. It can also be a brewery that hires another brewery to produce additional beer. The contract brewing company handles marketing, sales and distribution of its beer, while generally leaving the brewing and packaging to its producer-brewery (which, confusingly, is also sometimes referred to as a contract brewery).

Regional Craft Brewery: An independent regional brewery with a majority of volume in “traditional” or “innovative” beer(s).

Breweries (any version of the above) attract people to an area much like another type of attraction would. They are people magnets, and can serve as an economic engine providing jobs, and turning over dollars in a local economy. While working on a three-year research project for an article in *The Atlantic*, writer James Fallows and his wife Deborah developed an informal checklist of the traits that distinguished a place where things seemed to work, a summary of all the markers of successful towns.

(<https://www.theatlantic.com/magazine/archive/2016/03/eleven-signs-a-city-will-succeed/426885/>) Included in that list was that a successful city had craft beer. In an article entitled “Breweries are the Mark of a Thriving Community”, writer Jeff Alworth argues that not only are breweries the sign of a successful community, they actually are in part the cause of the community’s success. (<http://allaboutbeer.com/breweries-thriving-communities/>) They work well in old buildings, creating multiple redevelopment opportunities as improvements are made to any part of town, they create jobs and they create social hubs.

Considering that Brewpubs and Microbreweries have a solid history of success through challenging economic times and tend to be a draw in rural areas, it is the opinion of this consultant that a brewpub, regional craft brewery or microbrewery would be successful in downtown Kewaunee. Fisherman’s Point or the Klockner redevelopment site would be ideal for a new brewpub/microbrewery. It is recommended that the City market the intended site to already successful breweries from Milwaukee, Madison or the Fox Valley to see if they would start a second location in Kewaunee. The learning curve and start up challenges will have already been experienced and would ensure a smooth introduction to the community.



## Transportation

Related to tourism, transportation services in Kewaunee may have a large potential for more development – particularly for ground transportation and sightseeing services. There appears

to be a lack of ground transportation services, such as taxis, bus, and other passenger ground transportation.

About one-third of the demand for water transportation shown in the table below is for passenger transportation. There appears to be numerous fishing charters operating in Kewaunee. As tourism traffic increases, passenger sightseeing cruises (dinner cruises, etc.) may offer opportunities for further development and investment.

For air transportation, the Green Bay airport is only about 35 miles away, and Door County has 3 local airports serving it. Together with Green Bay, these airports may allow some travelers to bypass Kewaunee entirely. There may not be significant and unmet demand for additional airport access within the county. However, influencing air passengers arriving in Green Bay may be one marketing tactic to attract more tourism to Kewaunee.

Description	2017 Purchases by Kewaunee County Residents or Businesses in Kewaunee	2017 Purchases by Kewaunee County Residents or Businesses from Outside of Kewaunee	2017 Purchases by Visitors/Outside Businesses from Kewaunee	2017 Estimated Potential Demand in Kewaunee	2017 Payrolled Business Locations	2017 Jobs	Post Recession % Change in Jobs	2017 Location Quotient
Air Transportation, incl. Support Activities	\$63,608	\$10,270,288	\$44,177	\$10,378,073	0	0	0%	0.00
Water Transportation, incl. Support Activities	\$0	\$4,548,768	\$0	\$4,548,768	0	0	0%	0.00
Transit and Ground Passenger Transportation	\$711,967	\$2,200,593	\$281,081	\$3,193,640	3	23	(21%)	0.64
Scenic and Sightseeing Transportation	\$121,631	\$105,829	\$279,231	\$506,691	1	Insf. Data	Insf. Data	1.77

## Summary of Gap Analysis

According to the data presented above, there appears to be significant opportunity for a variety of retail sectors within a specified drive time from the City of Kewaunee. Although spending estimates predict several new establishments could be supported, retail is a tough industry to be successful in, especially without a solid business plan, lots of financial resources and the time to fine tune marketing efforts and build a following. Gaps existing today could change due to several factors outside of the control of the new business owner such as technology disruptions to an industry, the cost of gasoline hampering vacationers, unseasonable weather deterring visitors, to name a few.

New businesses interested in starting up in Kewaunee will face unique advantages and disadvantages due to the size of the community. Some benefits include lower overhead costs, stronger relationships with customers and the potential to become a big fish in a little pond. But there are plenty of drawbacks, too. For one, entrepreneurs who want to build a large professional network aren't likely to make as many connections in a town with fewer residents. Other restrictions might include extreme seasonality to the largest volume of visitors, limited industry options, a less diverse customer base, and difficulty attracting and keeping top talent, according to a recent article at [www.wallethub.com](http://www.wallethub.com).

Categories Exhibiting Retail Gaps
Auto Parts
Electronics & Appliance Stores
Building Materials, Garden Supplies and Equipment
Food and Beverage Stores
Health and Personal Care Stores
Gas and Convenience Stores
Clothing and Accessories
Sporting Goods, Musical Instruments, Hobby and Book Stores
General Merchandise Stores
Hotels
Amusement and Recreation Industries
Transportation

Although the numbers indicate a demand for more retail in the above categories, the local market can't support the entirety of the new revenue which will be needed to make these

stores successful. Something needs to draw more people to Kewaunee, and the building blocks are present for success in this effort. Enhancing the reasons for visitors to come to Kewaunee is the City's best opportunity to attract more dollars, which will in turn, provide the drive for more retail businesses. Investments made by the public and private sector to set the stage for more business should not be limited to physical infrastructure. A robust marketing plan must accompany any improvements to the landscape and/or retail, recreation and lodging scene.

## Co-Working Space

Coworking space is becoming more popular as it caters to entrepreneurs who benefit from the energy of other entrepreneurs as these young businesses are starting up. There are many ways to support entrepreneurial development that will work to suit Kewaunee's business environment and create jobs for and in this dynamic economy. The City could lead the effort to convert space in one of the large vacant buildings on its property into a coworking space. The program would provide open space for mobile office workers, pulling workers out of home offices into a collaborative space with other like business owners who will end up collaborating and sharing services. One or two conference rooms would need to be available, as well as office related services (such as copier/scanner/fax, common mail area, coffee, high speed internet, etc.). The remainder of the space would be furnished with tables and chairs, collaborative conversational settings in an open concept. These properties are not often private sector endeavors (except in large metropolitan areas, or when a corporation supports their own need for entrepreneurs to grow ideas) and would likely need ongoing public support, however they can generate enough revenue to sustain the operations once up and running.

The key to success in offering coworking space in Kewaunee is to plan it small and manageable, provide excellent programming and amenities and foster growth of participating businesses with technical support and networking.

If a local café or coffee shop has existing additional space which can be turned into dedicated space for the purposes of a coworking space, this may be the best first step. A coworking operation can also be included in a local library, or other gathering space which may have unused but programmable space.



IronTek is a successful coworking space in Beloit, WI, one component of the IronWorks Campus created by Hendricks Development and part of a sizable adaptive reuse project.

<http://irontek.co/>

Unicorn Hatch Labs is a dynamic space in St. George Utah which calls itself a community workspace. This concept could be successful in Kewaunee over time with the right nurturing.

<http://unicornhatchlabs.com>

There are many other examples on which to base a model for coworking space in Kewaunee. If this effort is to be successful, it is recommended a group of engaged stakeholders tour existing coworking spaces in Wisconsin and the Upper Peninsula of Michigan to learn of what works well in the regional economy and what type of amenities the business startups in the area would be interested in utilizing at a local coworking space.

## Developing and Enhancing a Tourism Draw

Tourism has seen some big changes over the past five years. Travelers have lost interest in chain restaurants, lodging and attractions. They want local food, local attractions and connection to the lifestyles of local people. This has led to new trends including the Slow Food Movement, Authentic Tourism, Geotourism, Agritourism, Heritage Tourism and more.

Geotourism is all about preserving local culture. Heritage tourism is getting visitors onto the backroads looking for historic churches, quilt barns and traditional crafts. Authentic tourism attracts visitors who like to see things just the way they are. The Slow Food Movement is getting people off the Interstate and into small town restaurants, where local cafes serve up their own specialties.

There is a ready market of interested visitors for small towns which are prepared to grow a tourism sector. Most business owners in small towns who aren't born there, are first attracted to the community as a visitor. By building up a tourism sector, a community is also implementing a business attraction strategy.

This is an opportunity for Kewaunee and should be an underlying theme to future activities related to developing the area formerly occupied by Hamacheck and Klockner, as well as Fisherman's Point and Ahnapee Landing.

Communities that incorporate economic and broader, longer-term, community development goals stand to gain more than small towns that take a piecemeal approach. Because community development includes short-range and long-range strategies, it is by definition a long-term and transformative process (a fact that is recognized more in community development circles than in economic development). Successful small towns tend to balance short-term economic gains with longer-term community development goals.

Small towns with the most dramatic outcomes tend to be proactive and future-oriented; they embrace change and assume risk. Successful community economic development strategies are guided by a broadly held local vision. In small towns, people are always the most important resource and communities with limited resources cannot afford to exclude anyone from planning or development efforts.

Joanne Steel of RuralTourismMarketing.com wrote about "5 Principles to Lay the Groundwork for your Small Town's Rural Regional Flavor Strategy". In the article she begins to share the five principles and then expands on each one in subsequent articles. These are important principals to keep in mind:

1. Help each locally owned business or organization to be world class, unique and continually innovative.

2. Know all the assets specific to your area and develop ways to add value to them.
3. Help weave together the assets of an area such as the artists, specialty food produces, local heritage, recreation opportunities, etc., and create practical activities across political jurisdictions.
4. Encourage visitors and residents to develop long-term emotional bonds with the region.
5. Be strategic about connecting urban and rural areas in the region.

<http://ruraltourismmarketing.com/2009/11/5-principles-to-lay-the-groundwork-for-your-small-town's-rural-regional-flavor-strategy/>



## Summary

Kewaunee is a dynamic small community with the potential to become a regional tourism draw with the right focus and energy, investment and diligence applied to 1) eliminating blight, 2) cultivating existing businesses to think beyond their perceived boundaries, 3) investing time and financial resources into preparing the public elements for private investment and 4) marketing the area effectively to investors, visitors and even residents.

Data shows the community with its current and projected traffic patterns can support additional lodging, a brewpub or microbrewery, kayak and bicycle rental business, and co-working space (if right-sized in scope and offerings). Additional restaurants are not necessarily supported by the data, but a restaurant paired with a brewery or hotel would do well. It will be important for any new business to understand the current seasonality of the area and build projections into their business plan to support a slow start as the community works hard to increase traffic during non-peak times.

Recommended improvements to public space should not be undertaken in isolation, but all stakeholders attempting to increase tourism traffic to the area should work in concert to promote all of Kewaunee's assets.