A Retail Market Snapshot for

Brattleboro, Vermont

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Prepared for:

Building a Better Brattleboro

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1.0 Introduction and Background

Brattleboro, Vermont is home to one of America's most unique and vibrant downtowns. The district offers the distinction of serving a local, regional, and visitor customer base that is rare in downtowns today. Downtown Brattleboro offers basic goods for the day-to-day needs of local consumers and the shoppers goods that appeal to locals and visitors. Even more remarkable is the appeal of the basic goods retailers to visitors who long for a more traditional approach to retail service and selection than that offered by suburban big box stores.

Downtown Brattleboro is not simply a shopping and dining destination. It is the single most concentrated collection of businesses in the Town of Brattleboro and the most important revenue generator for the ongoing success of the town. Building a Better Brattleboro is the steward of this dynamic economic engine. As such it has many partners including the Town Government of Brattleboro, the Greater Brattleboro Chamber of Commerce, the Brattleboro Development Credit Corporation and others.

Recognizing the need to identify the current market situation for downtown, Building a Better Brattleboro hired Arnett Muldrow & Associates, Ltd. to complete this market snapshot of downtown. Prior market study efforts, while detailed and thorough, are now dated and the dynamic changes of the retail market that have occurred since the 2008 recession coupled with the significance of online and social media are important considerations to any current study. As a result, this snapshot was designed to provide insight into trade patterns, potential recruitment targets, and marketing strategies for downtown Brattleboro for the coming three to five years with the understanding that a retail market such as Brattleboro's downtown is likely to see significant ongoing change in the coming few years.

The process of this study sought to engage the community on many levels. Twenty-three retailers throughout Brattleboro conducted a zip code survey of customers held in October of 2010. The zip code research led to a market definition study and a sales and retail leakage analysis for the community. This information was coupled with a series of one-on-one interviews with business owners, community stakeholders, and the Building a Better Brattleboro board of directors. Altogether, this information was then used to craft a series of recommendations for Building a Better Brattleboro and its partners to pursue. The recommendations are organized into three strategic themes.

This report would not have been possible were it not for the participation of many citizens and businesses in Brattleboro who took time out to track customers, share their opinions, and provide feedback on the project. Thanks go also to the Building a Better Brattleboro Board of Directors for their candid and thoughtful input. A special thanks goes to Andrea Livermore who organized the interviews, coordinated the zip code survey with merchants, and provided valuable help throughout the process.

2.0 Retail Market Study

This section of the report presents the findings of the retail market research for Brattleboro and sets the stage for further analysis that can be used to recruit business, help existing businesses target customers, and implement the accompanying marketing and recruitment strategy in chapter three of this report. The goal is to capitalize on Brattleboro's potential retail trade and channel that into investments that sustain downtown Brattleboro and potentially other retail districts within the city.

Chapter 2 is divided into four sections:

Section 2.1 is Brattleboro's market definition based on zip code survey work completed by businesses in the community. It also provides insight into Brattleboro's trade area demographics and presents market data related to Brattleboro's primary and secondary trade areas.

Section 2.2 provides demographic profiles of Brattleboro's primary and secondary trade areas. This section also presents a more detailed market segmentation using PRIZM® Lifestage characteristics a product of Nielsen Claritas.

Section 2.3 presents the retail market analysis that shows the amount of retail sales "leaking" from the primary and secondary trade areas. This information is based on the most recent data available and is a reliable source for understanding overall market patterns. This section concludes with some key opportunities for retail that could be used to both enhance existing businesses and recruit additional businesses to downtown.

Section 2.4 summarizes Brattleboro's current retail environment, and indicates market characteristics and trends that form the basis of the recommendations presented in Chapter 3.

2.1 Market Definition

Unlike radial and drive time studies that tend to use arbitrarily picked boundaries for customer trade zones, the method used for market definition in Brattleboro is based on zip code survey work completed by cooperative merchants. In the case of Brattleboro a radial study would yield inaccurate data as the nearby Connecticut River creates a strong geographic boundary with only selective crossings. A drive time study presents particular problems as well, as the I-91 corridor tends to funnel customers both to and away from Brattleboro itself. Zip code surveys have their own limitations in that the zip code geography can sometimes be fairly large and stretch beyond the typical market boundaries. However, it is the only technique that correlates easily with customer traffic collected by merchants. The zip codes are used to then define a primary and secondary trade area for the community from which a whole host of demographic data can be gleaned.

Twenty-three Brattleboro retail businesses graciously participated in the zip code survey of their customers conducted in October of 2010. Merchants were provided with a form to record customer zip codes and asked to keep the log for all customers during a seven-day period. In all, the businesses recorded 1,912 individual customer visits during a one-week period.

2.1.1 *Zip Code Results*

The results of the zip code survey are listed below:

- Brattleboro businesses recorded 1,912 customer visits from 443 unique American zip codes representing 41 states, DC, four Canadian provinces, 7 other foreign countries, and two military zip codes.
- The Brattleboro zip code 05301 had the most visits of any zip codes with 42% of customers from this geographic area. The Brattleboro zip code is a large geography that covers several small "village" areas.
- The Putney zip code (05354) had 8% of the overall visits and was the second most often cited zip code.
- Other neighboring zip codes (Vernon, VT 05354; Hinsdale, NH 03451; Wilmington, VT 05363 and Marlboro, VT) each accounted for an additional 2% of the visits equaling another 8% of total visits.
- Other "neighboring" zip codes accounted for 8% collectively.
- Visitors from outside the immediate area accounted for approximately 34% of the overall visits. True "visitors" are probably slightly lower than this number but visitors from places other than Vermont, New Hampshire, Massachusetts, and Connecticut accounted for 14% of the customer visits indicating a strong visitor attraction for downtown outside of the nearby New England states.

Figure 1 provides a snapshot of the information above breakouts of customer visits.

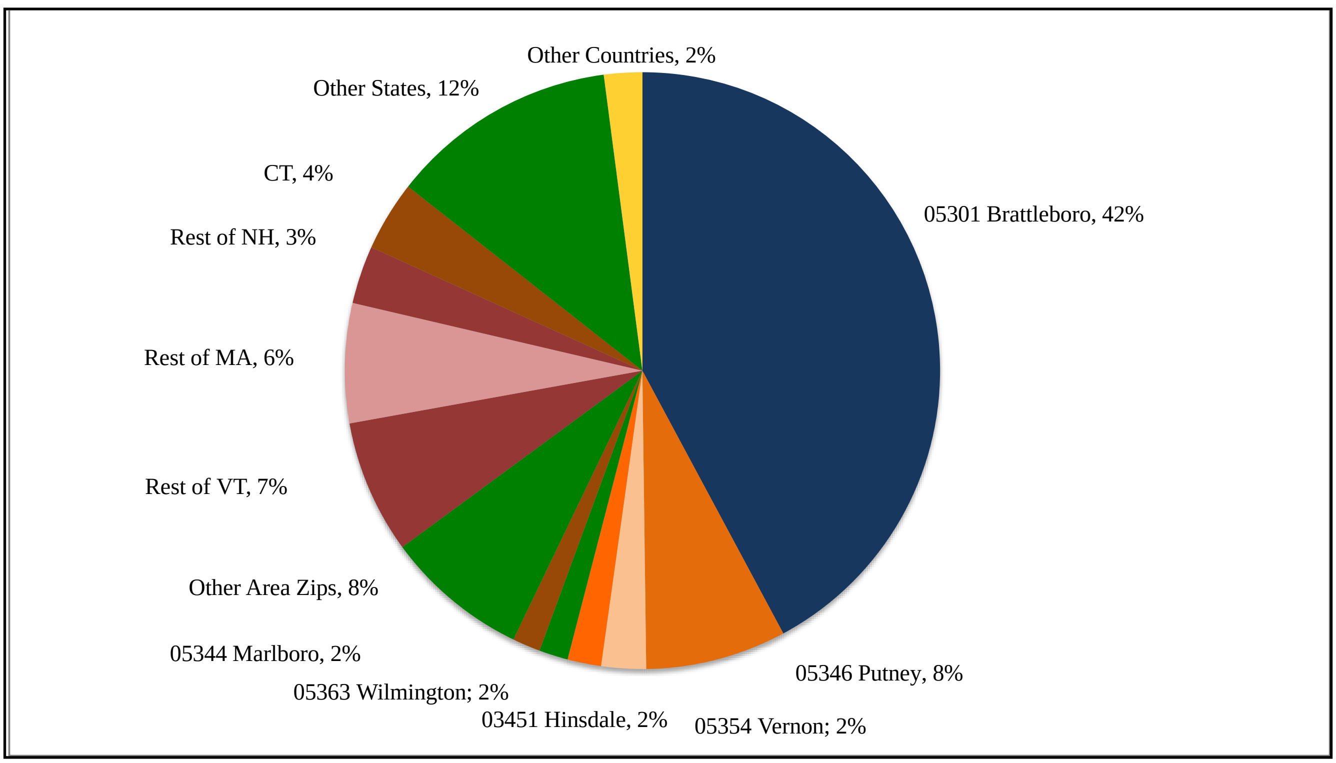

Figure 1:Customer visits to participating businesses by zip code.

2.2 Trade Area Definition

The number of visits provides an overall view of customer origin. A more accurate way to evaluate customer loyalty in the market is placing customer visits in the context of the population of each zip code. This corrects for zip codes that have exceedingly large or small populations that might skew the market penetration data. By this measure, the primary and secondary trade areas for the community can be established. The primary trade area is the geography where the most loyal and frequent customers to Brattleboro reside. The secondary trade area represents an area where Brattleboro businesses can rely on customers but to a lesser degree. To establish the trade areas, a table is created to show customer visits per thousand residents. Each zip code population is taken, then the number of visits from that zip code are calculated. We recognize that some zip codes do not have 1000 visits but the index allows for an equal comparison of market penetration per zip code. Table 1 on the following page shows customer visits per 1,000 people for each of the highest representative visits to Brattleboro.

Place	Name	State	2009 Population	Visits	Visits per Thousand
05344	Marlboro	VT	281	30	106.76
05358	West Halifax	VT	153	11	71.90
05301	Brattleboro	VT	16,444	833	50.66
05346	Putney	VT	5,213	151	28.97
05354	Vernon	VT	2,133	48	22.50
03443	Chesterfield	NH	645	14	21.71
05345	Newfane	VT	1,704	28	16.43
05353	Townshend	VT	998	16	16.03
03466	West Chesterfield	NH	1,153	17	14.74
05363	Wilmington	VT	2,263	31	13.70
05343	Jamaica	VT	893	11	12.32
03451	Hinsdale	NH	4,082	36	8.82
01301	Greenfield	MA	18,482	21	1.14
03431	Keene	NH	24,769	23	0.93

Table 1: Customer visits per 1,000 population.

Determining the primary and secondary trade areas can sometimes be more "art" than science. At times, significant breaks in customer visits are not obvious. In Brattleboro's case the division for the primary trade area *is* fairly obvious. With over 100 visits per thousand residents, Marlboro (05344) emerges as the "most loyal" zip code for Brattleboro. Marlboro and second most loyal West Halifax have small populations, which allow them to eclipse their more populous neighbor, the Brattleboro 05301 zip code, which is the third most loyal zip code to local merchants with 50.66 visits per thousand residents.

Eight zip codes comprise the secondary trade area with between 29 and 12 visits per thousand residents. Nearby Hinsdale, New Hampshire had a significant number of visits with 36 but only 9 visits per thousand when compared with the population of the zip code. Thus it (and those below it) is considered outside the primary and secondary trade areas for Brattleboro.

Figures 2 and 3 on the following page display the extent of the primary and secondary trade areas for Brattleboro as two adjacent geographies. Note the influence of both the Interstate 91 corridor and the Connecticut River on the boundaries of the trade areas. These natural and man-made barriers have a significant impact on trading patterns in Brattleboro.

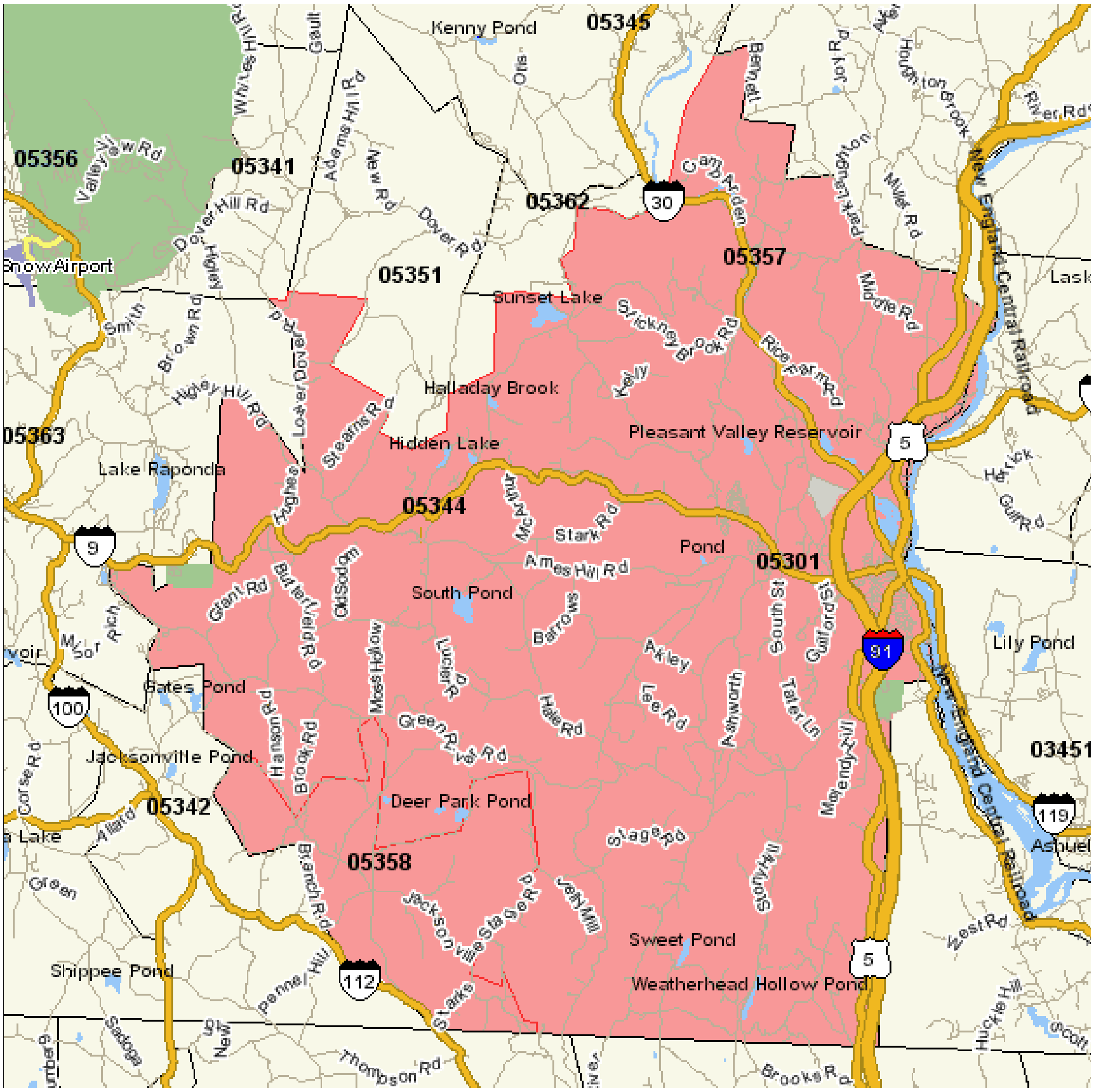

Figure 2: Primary trade area.

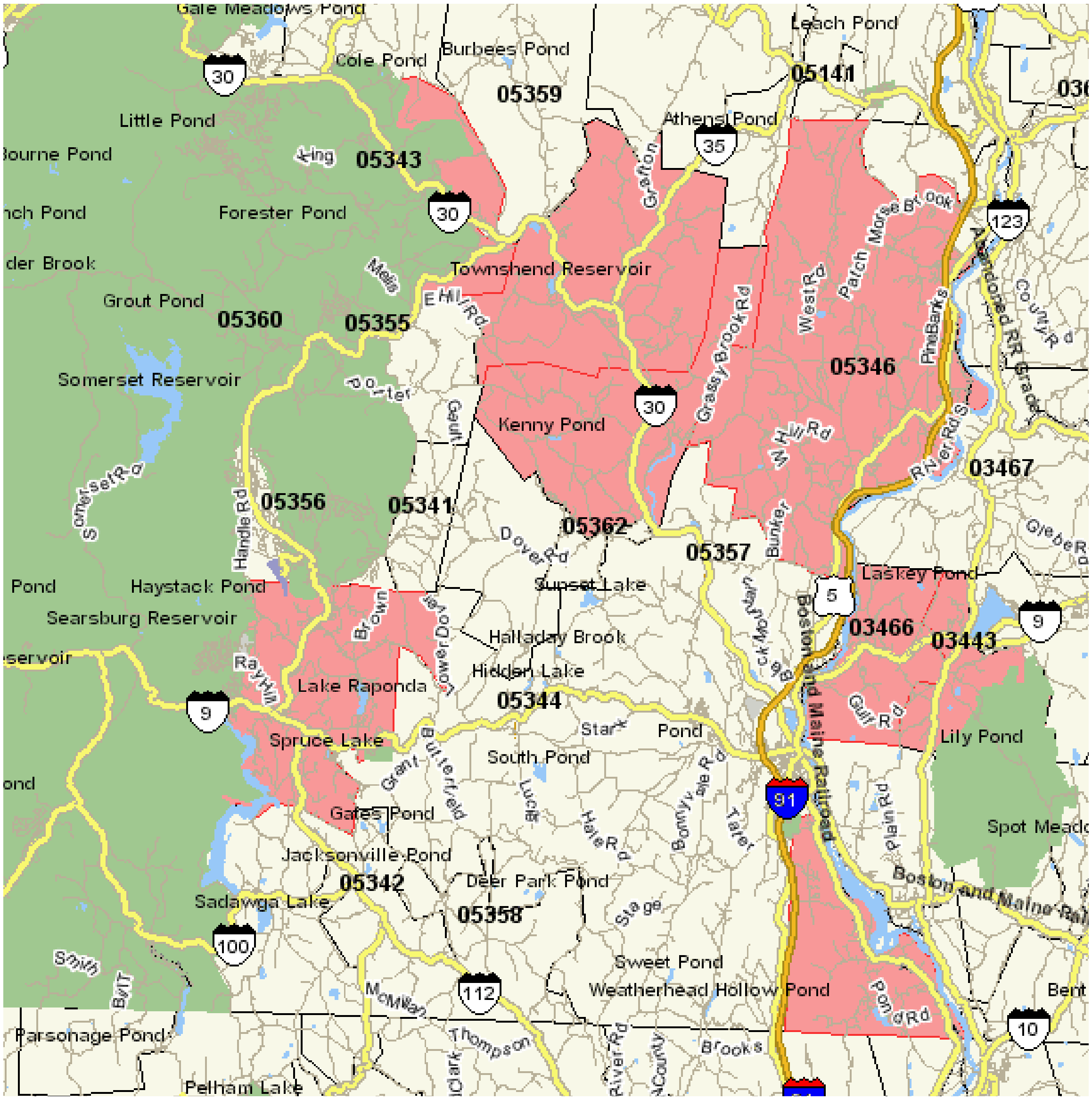

Figure 3: Secondary trade area.

2.3 Trade Area Demographics and Market Segments

2.3.1 Brattleboro Primary Trade Area Demographics

In 2010, the population for Brattleboro's primary trade area is estimated to be 16,272. The population has been on a decline since 2000 where it stood at 16,874. The population is expected to continue to decline by 2015 to 15,824 or 2.75%. The median household income for the Brattleboro primary trade area is $43,317. This income level lags that of Vermont, which is $51,704 and the United States at $52,175.

Primary Trade Area Population	
1990 Census	16,701
2000 Census	16,874
2010 Estimated	16,272
2015 Projected	15,824
Percent Growth	
1990-2000	1.04%
2000-2010 Estimated	-3.57%
2010-2015 Projected	-2.75%

2.3.2 Brattleboro Secondary Trade Area Demographics

The secondary trade area (which includes the eight zip codes in table one above) has an estimated 2010 population of 15,159; nearly as much as the primary trade area. This population experienced robust growth between 1990 and 2000 of over 12%. Growth was flat between 2000 and 2010 and is expected to continue on a very slight decline by 2015 to 13,509. The median household income of the secondary trade area is significantly higher than that of the primary trade area at $53,478 and is higher than both Vermont and the United States.

Secondary Trade Area Population	
1990 Census	14,985
2000 Census	15,144
2010 Estimate	15,159
2015 Projected	13,509
Percent Growth	
1990-2000	12.21%
2000-2010	-0.10%
2010-2015	-1.05%

2.3.3 *Life Stage and Social Group Market Segmentation*

Market segmentation is a way to summarize demographic information into easy to understand categories. The market segmentation illustrated for Brattleboro's trade areas uses Claritas PRIZM® data. PRIZM® defines every US household in terms of 66 demographic and behavioral types to help determine the lifestyles, purchase behaviors, likes and dislikes of the customer base. These are arranged into both social and life stage groups.

For ease of understanding, life stage categories are illustrated in charts below. The green colors represent households without children and generally a younger life stage, the red represents families with children in the home, and the blue represents empty nesters and retirees. The darker the color shows more affluence.

In the case of Brattleboro, 49% of the households are in the older market demographics. Families with children represent 14% of the life stage with "mainstream families" at 7%. "Younger years" comprise about 37% of the households with "striving singles" at 25%. Striving singles represent an opportunity segment because although they are currently not big earners, their earning potential could grow over time.

As is the case in many smaller cities and towns, the population indexes at lower income levels than the rest of the United States. However, there are pockets of affluence including "midlife success" that comprise 6% of the primary trade area market and "affluent empty nests" with 4% of the market, and "young accumulators" with 2% of the market.

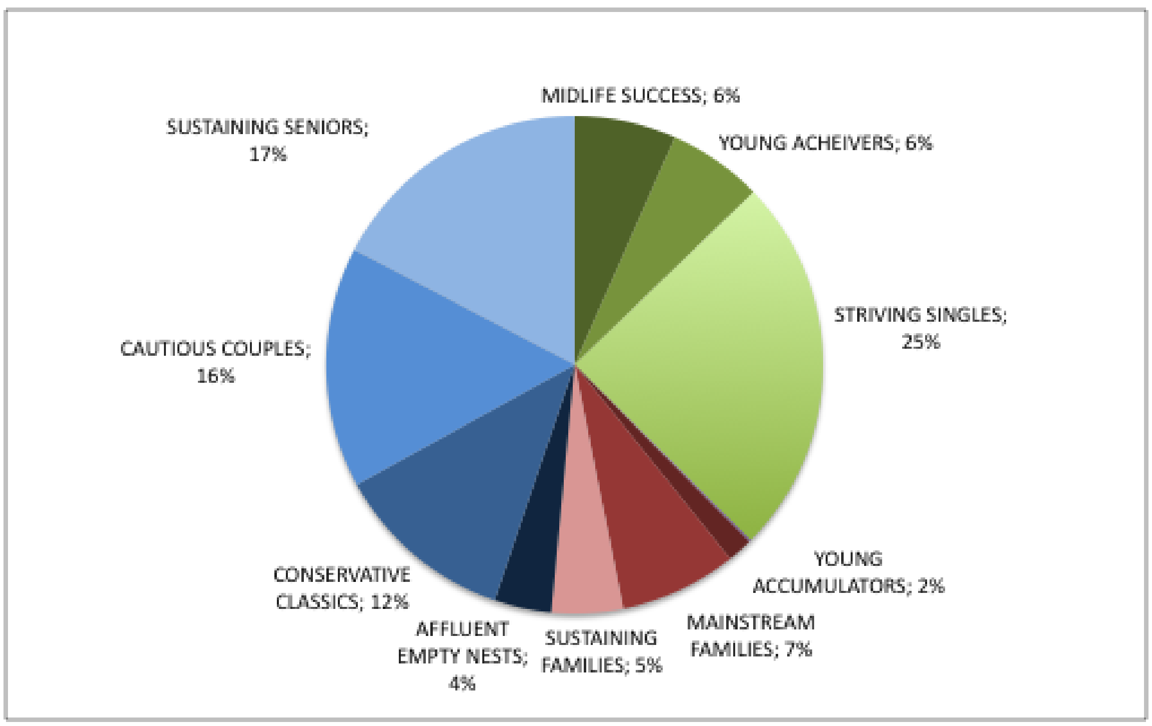

Figure 4: Lifestage segmentation for Brattleboro primary trade area. Source: Neilson Claritas

As shown in Figure 5 below, the secondary trade area demographics shift slightly to an older and more affluent market. The older market demographics in the secondary trade area account for 53% of the market while the younger years account for 34% and middle years for 13%.

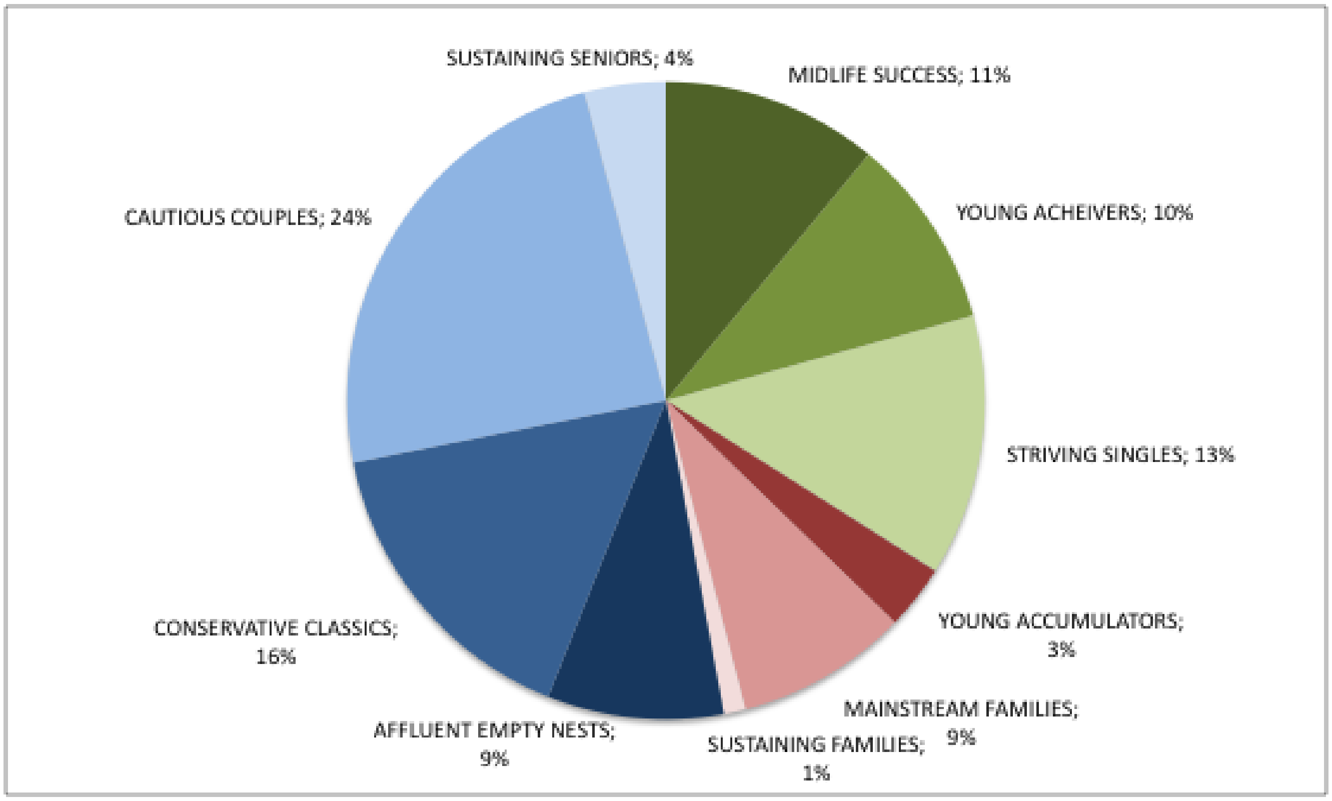

Figure 5: Lifestage segmentation for Brattleboro Secondary Trade area. Source Data: Neilson Claritas.

2.3.4 Detailed Market Segmentation

The following descriptions are provided by Neilson Claritas for Brattleboro's Primary Trade Area segments. They are further breakouts of the themes listed above in the charts and provide a brief description of the type of households found within each segment. Bear in mind that the indexed listings below apply only to the primary trade area for Brattleboro and not it's visitor market or secondary trade area.

Mature Years

Big Fish, Small Pond
3.7% of Households in Brattleboro PTA, Index to United States 173
These are upscale, older households without kids. The members of this category are college-educated professionals that are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, including belonging to country clubs, maintaining large investment portfolios, and spending freely on computer technology.

Traditional Times
11.8% of Households in PTA, Index to United States 417
Traditional Times is and older demographic without kids that have the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their fifties and sixties, these upper-middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles ranging from Country Living and Country Home to Gourmet and Forbes. But they're big travelers, especially in recreational vehicles and campers.

Simple Pleasures
9.5% of Households in Brattleboro PTA, Index to United States 400
With more than two-thirds of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement. And a disproportionate number served in the military, so no segment has more residents who are members of veterans clubs.

Heartlanders
6.2% of Households in Brattleboro PTA, Index to United States 313
America was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of older couples with lower to middle incomes is typically without children. They have white-collar jobs and live in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders residents pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping, and boating.

Golden Ponds
4.8% of Households in Brattleboro PTA, Index to United States 282
Golden Ponds is mostly a retirement lifestyle, dominated by downscale singles and couples over 65 years old. Found in small bucolic towns around the country, these high school-educated seniors live in small apartments on less than $32,000 a year; one in five resides in a nursing home. For these elderly residents, daily life is often a succession of sedentary activities such as reading, watching TV, playing bingo, and doing craft projects.

Old Milltowns
7.8% of Households in Brattleboro PTA, Index to United States 494
America's once-thriving mining and manufacturing towns have aged--as have the residents in Old Milltowns communities. Today, the majority of residents are retired singles and couples, living on downscale incomes in pre-1960 homes and apartments. For leisure, they enjoy gardening, sewing, socializing at veterans clubs, or eating out at casual restaurants.

Back Country Folks
4.8% of Households in Brattleboro PTA, Index to United States 212
Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 55 years old, and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape.

Family Life

Fast-Track Families
1.6% of Households in Brattleboro PTA, Index to United States 102
With their upscale incomes, numerous children, and spacious homes, Fast-Track Families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems, and video games. They take advantage of their rustic locales by camping, boating, and fishing.

Big Sky Families
3.7% of Households in Brattleboro PTA, Index to United States 200
Scattered in placid towns across the American heartland, Big Sky Families is a segment of younger rural families who have turned high school educations and blue-collar jobs into busy, upper-middle-class lifestyles. Residents enjoy baseball, basketball, and volleyball, as well as fishing, hunting, and horseback riding. To entertain their sprawling families, they buy virtually every piece of sporting equipment on the market.

Shotguns and Pickups
2.0% of Households in Brattleboro PTA, Index to United States 123
The segment known as Shotguns & Pickups came by its moniker honestly: it scores near the top of all lifestyles for owning hunting rifles and pickup trucks. These lower to middle income Americans tend to be young, working-class couples with large families--more than half have two or more kids--living in small homes and manufactured housing. Nearly a third of residents live in mobile homes, more than anywhere else in the nation.

Bedrock America
4.7% of Households in Brattleboro PTA, Index to United States 250
Bedrock America consists of young, economically challenged families in small, isolated towns located throughout the nation's heartland. With modest educations, sprawling families, and service jobs, many of these residents struggle to make ends meet. One quarter live in mobile homes. One in three haven't finished high school. Rich in scenery, Bedrock America is a haven for fishing, hunting, hiking, and camping.

Younger Years

Country Casuals
1.6% of Households in Brattleboro PTA, Index to United States 103
There's a laid-back atmosphere in Country Casuals, a collection of middle-aged, upscale households that have started to empty-nest. Most households boast two earners who have well-paying management jobs or own small businesses. Today these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares, and going out to eat.

Mayberry-ville
4.8% of Households in Brattleboro PTA, Index to United States 203

Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, upper-middle-class couples like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles, and pickup trucks.

Greenbelt Sports
6.2% of Households in Brattleboro PTA, Index to United States 462
These households are upper-middle income and middle age without kids. A segment of upscale exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college-educated, and own new homes. Few segments have higher rates for pursuing outdoor activities such as skiing, canoeing, backpacking, boating, and mountain biking.

Red White and Blues
4% of Households in Brattleboro PTA, Index to United States 386
The residents of Red, White & Blues typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast-food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack, and Payless Shoes. Middle-aged, high school educated, and lower-middle class, these folks tend to have solid, blue-collar jobs in manufacturing, milling, and construction.

Blue Highways
4.6% of Households in Brattleboro PTA, Index to United States 296
On maps, blue highways are often two-lane roads that wind through remote stretches of the American landscape. Among lifestyles, Blue Highways is the standout for lower-middle-class residents who live in isolated towns and farmsteads. Here, Boomer men like to hunt and fish; the women enjoy sewing and crafts, and everyone looks forward to going out to a country music concert.

Young & Rustic
7.7% of Households in Brattleboro PTA, Index to United States 405
Young & Rustic is composed of middle age, restless singles. These folks tend to be lower-middle income, high school-educated, and live in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars, and dating.

Crossroads Villagers
8.2% of Households in Brattleboro PTA, Index to United States 397
With a population of middle-aged, white-collar couples and families, Crossroads Villagers is a classic rural lifestyle. Residents are high school-educated, with downscale incomes and modest housing; one-quarter live in mobile homes. And there's an air of self-reliance in these households as Crossroads Villagers help put food on the table through fishing, gardening, and hunting.

2.4 Retail Market Analysis

Brattleboro is a retail center serving the primary and secondary markets defined above. In this section the Brattleboro market will be examined to identify potential opportunities for new or expanded stores by examining "retail leakage." This will allow the community to assess what kind of additional stores might be attracted to Brattleboro and will help individual existing businesses understand how they might diversify product lines.

2.4.1 Retail Leakage in the Trade Areas

Retail leakage refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by the stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside of the area are said to be "leaking." If a community is a major retail center with a variety of stores it will be "attracting" rather than "leaking" retail sales. Even large communities may see leakage in certain retail categories while some small communities may be attractors in categories.

Such an analysis is not an exact science. In some cases large outflow may indicate that money is being spent elsewhere (drug store purchases at a Wal-Mart or apparel purchases through the internet). It is important to note that this analysis accounts best for retail categories where households (rather than businesses) are essentially the only consumer groups. For example, lumberyards may have business sales that are not accounted for in consumer expenditures. Stores such as jewelry shops and clothing stores are more accurately analyzed using this technique.

The leakage study for Brattleboro is a "snapshot" in time. Consequently, there are factors that point to this being a more conservative or more aggressive look at retail potential depending on what factors are examined. For example, population decline means that there will be fewer customers in the future resulting in less demand for retail.

However, this leakage study only examines the three zip codes for the primary and eight zip codes for the secondary trade areas identified for Brattleboro. It is already evident from the zip code study that many stores in Brattleboro depend on a market far beyond these zip codes including robust visitor traffic to sustain their success.

The primary trade area (the 05301, 05358, and 05344 zip codes) selected store sales equaled $374.9 million in 2010. Consumers in the same area spent $233.6 million. The primary trade area is gaining $141.3 million in sales annually. These gains in sales are occurring only in certain retail categories.

The eight zip codes of the secondary trade area had store sales volume of $154.6 million (less than half of that of Brattleboro's primary trade area). Consumer expenditures in the eight zip codes were roughly the same however at $232.8 million meaning that these zip codes leak sales of about $78.2 million annually.

Together the combined trade area is a "gaining market" to the tune of $63.1 million each year.

2.4.2 The "Hinsdale Factor"

It is important to note that Hinsdale, New Hampshire is not included in the data above or the table below, as it did not register in the primary or secondary trade areas for Brattleboro. It is a unique market in that it has sales of $57 million most of which is sales in two categories: general merchandise (Wal-Mart) and beer/wine/liquor. Wal-Mart certainly has a strong impact on retail trade in Brattleboro though the major impact has likely been absorbed for many years now. The retail store types in downtown Brattleboro that offer "basic goods" will need to continue to focus on customer service and unique items to remain competitive with big-box stores. Fortunately, these stores seem to have been able to do so up to this point and remain a major attractor for local, regional, and visitor shoppers.

2.4.3 Detailed Retail Market Opportunity Table

The tables on the following pages explore the individual retail categories where Brattleboro is leaking and gaining sales in both the primary and secondary trade areas. This data should be used as an overall guide to retail market potential and should not substitute for detailed market research on the part of any business wishing to open in the area.

The white column indicates retail store types along with NAICS codes for these stores. Please note that some categories are subsets of larger categories. The pink columns represent the Brattleboro primary trade area. The orange columns represent the Brattleboro secondary trade area. Red numbers indicate an inflow of dollars and black numbers indicate market leakage.

RMP Opportunity Gap - Retail Stores 2010	PTA			STA		
	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	233,589,386	374,912,768	(141,323,382)	232,838,943	154,622,880	78,216,063
Motor Vehicle and Parts Dealers-441	36,095,852	56,274,726	(20,178,874)	40,261,837	7,331,434	32,930,403
Automotive Dealers-4411	29,798,333	49,838,976	(20,040,643)	32,971,458	3,545,446	29,426,012
Other Motor Vehicle Dealers-4412	2,788,488	1,167,076	1,621,412	3,848,432	1,545,132	2,303,300
Automotive Parts/Tire Stores-4413	3,509,031	5,268,674	(1,759,643)	3,441,947	2,240,856	1,201,091
Furniture and Home Furnishings Stores-442	4,766,529	5,724,680	(958,151)	4,871,435	1,239,180	3,632,255
Furniture Stores-4421	2,542,984	731,227	1,811,757	2,620,456	0	2,620,456
Home Furnishing Stores-4422	2,223,545	4,993,453	(2,769,908)	2,250,979	1,239,180	1,011,799
Electronics and Appliance Stores-443	5,289,593	20,031,014	(14,741,421)	5,297,209	2,514,451	2,782,758
Appliances, TVs, Electronics-44311	4,032,234	17,581,053	(13,548,819)	4,020,509	2,514,451	1,506,058
Household Appliances-443111	924,969	14,614,257	(13,689,288)	927,915	39,501	888,414
Radio, Television, Elect.-443112	3,107,265	2,966,796	140,469	3,092,594	2,474,950	617,644
Computer and Software Stores-44312	1,050,232	2,449,961	(1,399,729)	1,051,375	0	1,051,375
Camera/Photographic Equip.-44313	207,127	0	207,127	225,325	0	225,325
Building Material, Garden Equip Stores -444	23,684,769	49,390,083	(25,705,314)	24,383,204	26,427,197	(2,043,993)
Building Material and Supply Dealers-4441	21,572,594	48,029,405	(26,456,811)	22,097,825	24,638,035	(2,540,210)
Home Centers-44411	9,258,306	29,153,253	(19,894,947)	9,493,640	16,530,018	(7,036,378)
Paint and Wallpaper Stores-44412	489,542	216,411	273,131	499,682	72,137	427,545
Hardware Stores-44413	2,106,860	10,450,302	(8,343,442)	2,147,210	900,889	1,246,321
Other Building Mat. Dealers-44419	9,717,886	8,209,439	1,508,447	9,957,293	7,134,991	2,822,302

RMP Opportunity Gap - Retail Stores 2010	PTA			STA		
	Demand (Consumer Expenditures)	**Supply (Retail Sales)**	**Opportunity Gap/Surplus**	**Demand (Consumer Expenditures)**	**Supply (Retail Sales)**	**Opportunity Gap/Surplus**
Bldg. Mat., Lumberyards-444191	3,996,613	3,211,647	784,966	3,939,923	2,791,308	1,148,615
Lawn, Garden Equip/ Supplies-4442	2,112,175	1,360,678	751,497	2,285,379	1,789,162	496,217
Outdoor Power Equip. Stores-44421	328,186	16,263	311,923	438,126	444,742	(6,616)
Nursery and Garden Centers-44422	1,783,989	1,344,415	439,574	1,847,253	1,344,420	502,833
Food and Beverage Stores-445	32,587,000	56,763,094	(24,176,094)	30,805,884	22,344,108	8,461,776
Grocery Stores-4451	29,768,630	53,369,356	(23,600,726)	28,107,312	21,301,245	6,806,067
Supermarkets, Grocery (Ex Conv) Stores-44511	28,224,757	52,651,636	(24,426,879)	26,662,349	21,162,163	5,500,186
Convenience Stores-44512	1,543,873	717,720	826,153	1,444,963	139,082	1,305,881
Specialty Food Stores-4452	1,015,770	2,126,856	(1,111,086)	957,113	1,042,863	(85,750)
Beer, Wine and Liquor Stores-4453	1,802,600	1,266,882	535,718	1,741,459	0	1,741,459
Health and Personal Care Stores-446	13,253,647	41,468,329	(28,214,682)	12,588,140	16,822,876	(4,234,736)
Pharmancies and Drug Stores-44611	11,427,501	34,903,093	(23,475,592)	10,831,796	16,722,282	(5,890,486)
Cosmetics, Beauty, Perfume 44612	463,603	0	463,603	438,959	0	438,959
Optical Goods Stores-44613	521,792	353,494	168,298	521,714	0	521,714
Other Health/Personal Care-44619	840,751	6,211,742	(5,370,991)	795,671	100,594	695,077
Gasoline Stations-447	21,811,167	56,242,441	(34,431,274)	21,215,841	14,449,963	6,765,878
Gasoline Stations With Conv Stores-44711	16,366,322	29,903,387	(13,537,065)	15,837,429	4,672,405	11,165,024
Other Gasoline Stations-44719	5,444,845	26,339,054	(20,894,209)	5,378,412	9,777,558	(4,399,146)
Clothing and Clothing Accessories Stores-448	11,156,003	6,786,210	4,369,793	11,092,656	1,639,041	9,453,615
Clothing Stores-4481	8,050,591	5,233,666	2,816,925	8,011,208	846,476	7,164,732
Men's Clothing Stores-44811	525,575	0	525,575	524,772	0	524,772

RMP Opportunity Gap - Retail Stores 2010	PTA			STA		
	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Women's Clothing Stores-44812	2,002,263	2,884,350	(882,087)	1,991,026	0	1,991,026
Childrens, Infants Clothing-44813	414,736	88,254	326,482	412,688	22,063	390,625
Family Clothing Stores-44814	4,366,522	1,953,615	2,412,907	4,345,831	372,816	3,973,015
Clothing Accessories Stores-44815	194,908	45,842	149,066	194,695	183,367	11,328
Other Clothing Stores-44819	546,587	261,605	284,982	542,196	268,230	273,966
Shoe Stores-4482	1,552,299	1,313,179	239,120	1,500,589	0	1,500,589
Jewelry, Luggage, Leather-4483	1,553,113	239,365	1,313,748	1,580,859	792,565	788,294
Jewelry Stores-44831	1,421,965	239,365	1,182,600	1,452,028	792,565	659,463
Luggage Leather Goods-44832	131,148	0	131,148	128,831	0	128,831
Sporting Goods, Hobby, Book, Music Stores-451	4,901,490	5,363,683	(462,193)	4,884,818	2,259,708	2,625,110
Sportng Gds, Hobby, Musical -4511	3,303,202	4,665,487	(1,362,285)	3,343,173	1,970,910	1,372,263
Sporting Goods Stores-45111	1,739,242	4,368,254	(2,629,012)	1,779,652	1,387,098	392,554
Hobby, Toys Games Stores-45112	1,048,178	29,854	1,018,324	1,032,859	7,463	1,025,396
Sew/Needlework/Piece Gds-45113	228,029	148,724	79,305	237,749	229,040	8,709
Musical Instrument/Supplies-45114	287,753	118,655	169,098	292,913	347,309	(54,396)
Book, Periodical, Music Stores-4512	1,598,288	698,196	900,092	1,541,645	288,798	1,252,847
Book Stores/News Dealers-45121	1,161,391	551,343	610,048	1,104,760	288,798	815,962
Book Stores-451211	1,103,187	551,343	551,844	1,049,993	288,798	761,195
News Dealers/Newsstand-451212	58,204	0	58,204	54,767	0	54,767
Tapes, CDs, Record Stores-45122	436,897	146,853	290,044	436,885	0	436,885
General Merchandise Stores-452	32,437,366	10,011,527	22,425,839	31,508,786	8,660,644	22,848,142
Department Stores-4521	15,387,110	3,150,312	12,236,798	15,158,724	759,849	14,398,875
Other General Merchandise-4529	17,050,256	6,861,215	10,189,041	16,350,062	7,900,795	8,449,267
Miscellaneous Store Retailers-453	6,802,482	14,819,796	(8,017,314)	6,739,381	10,252,591	(3,513,210)
Florists-4531	454,088	296,992	157,096	461,974	424,277	37,697
Office Supplies, Stationery, Gift-4532	2,486,791	8,293,825	(5,807,034)	2,446,553	7,531,318	(5,084,765)
Office Supplies/Stationery -45321	1,411,696	2,858,707	(1,447,011)	1,394,404	0	1,394,404
Gift, Novelty/Souvenir -45322	1,075,095	5,435,118	(4,360,023)	1,052,149	7,531,318	(6,479,169)

RMP Opportunity Gap - Retail Stores 2010	PTA			STA		
	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Used Merchandise Stores-4533	533,257	725,734	(192,477)	527,455	582,901	(55,446)
Other Misc. Store Retailers-4539	3,328,346	5,503,245	(2,174,899)	3,303,399	1,714,095	1,589,304
Non-Store Retailers-454	16,636,730	11,426,951	5,209,779	16,203,610	28,407,682	(12,204,072)
Foodservice and Drinking Places-722	24,166,758	40,610,234	(16,443,476)	22,986,142	12,274,005	10,712,137
Full-Service Restaurants-7221	10,757,457	21,579,665	(10,822,208)	10,245,004	9,724,375	520,629
Limited-Service Eating Places-7222	10,280,716	13,887,114	(3,606,398)	9,763,168	1,574,908	8,188,260
Special Foodservices-7223	2,013,854	4,480,992	(2,467,138)	1,915,461	722,741	1,192,720
Drinking Places -Alcoholic Bev.-7224	1,114,731	662,463	452,268	1,062,509	251,981	810,528

2.4.4 Key Market Opportunities

The retail market potential for Brattleboro combines many different facets of the data gathered above. Not simply a collection of numbers, retail markets depend on both quantitative and qualitative information. Moreover, just because there is retail market potential for a potential retail store type in no way ensures that success of that store type in the community. There are many reasons why a business might succeed or fail and the retail market is but one of those factors. However, this does provide a synopsis guide for the "best potential" retail opportunities in Brattleboro based on the leakage data above, retail clustering potential, and the ability of the market to continue its appeal to both a local, regional, and visitor customer base. These market opportunities are as follows:

Food Related Retail
The strength of the Brattleboro Food Coop and the growing trend of consumers interested in more specialty food items bodes will for the potential of future food service in downtown Brattleboro. The retail market gains in these categories but Brattleboro could definitely continue to grow as a center of organic, locally grown and produced food.

Clothing, Shoes, and Clothing Accessories
Brattleboro's primary and secondary trade areas both leak sales in the clothing categories. It is very likely that some residents of these areas are either trading their traditional clothing dollar at the Hinsdale Wal-Mart and others are traveling to larger communities with big box clothing stores. However, the sheer amount of leakage represents a chance for Brattleboro to have several specialty-oriented clothing shops. These are likely to be small retail shops owned by independent merchants who can specifically tailor their offerings to the local and visiting customer.

Furniture and Home Furnishings
These categories represent a potential strength for downtown Brattleboro. The community already has a collection of very nice furniture and home furnishings stores and the growing cluster could cater to the second home market and to visitors who wish to bring home handcrafted Vermont wares.

Full and Limited Service Restaurants
Brattleboro benefits from an excellent and eclectic collection of restaurants in downtown. Restaurants tend to develop in clusters. Although the community is already quite strong in this category, additional independent restaurants that carefully fill a "niche" market could build the clustering opportunity for downtown. Limited service restaurants could also have potential although they are typically likely to locate in areas outside of downtown.

A General Merchandise "Bazaar"
This might take the model of the Food Coop and consider eating into the impact of the nearby Wal-Mart in Hinsdale. The concept would need to start small and experimental but could be a bellwether for future stores of similar type across Vermont. Successful models that might be explored are Mast General Store in North Carolina and Renny's in Maine.

Specialty Retail
Many specialty retail stores can be successful in downtown. Typically these stores provide art and craft merchandise and many of these store types combine studio with gallery space. Other more

specific and unique store types can cluster in downtown. Downtown Brattleboro is already an excellent cluster of highly specialized stores where new retail could easily slot in to appeal to a broad variety of clientele.

2.5 Overall Market Observations and Conclusions

Based on the retail leakage data illustrated above, Brattleboro has the opportunity to expand its retail presence for not only for the downtown district but also throughout the City. Retail expansion in Brattleboro is likely to involve the concerted effort of the public and the private sector in partnership. The following conclusions will form the basis of the recommendations to follow in Chapter three of this report.

- Downtown Brattleboro is a dynamic retail center with a remarkable collection of shops, restaurants, experiences, accommodations, and entertainment options. The market clearly appeals to a broad base of consumers ranging from local shoppers to regional customers to visitors from near and far. Brattleboro’s downtown is playing with the “big leagues” in downtowns across America which mandates an ever more savvy marketing effort to maintain success.
- Brattleboro’s primary trade area has been on a consistent decline in population for the past two decades. This decline is expected to continue. By contrast the secondary trade area saw significant growth during the period between 1990 and 2000 although that growth has slowed to a “flat line” since 2000. This is not a problem unique to Brattleboro but it does point to the need for an ongoing regional discussion about how to conduct economic development and position the region as a “crossroads” between the education institutions and the students they produce and the appeal of a Vermont lifestyle. These discussions will fall outside the scope of this study and are already underway.
- In spite of these challenges, Brattleboro’s primary trade area retains several relatively affluent demographic market segments that index high against the United States that can be the foundation of a variety of retail types. Some of these demographic segments are precisely what is needed from a recruitment standpoint, younger professionals and entrepreneurs interested in an active outdoor lifestyle but convenient to larger urban locations.
- Visitor traffic from other places is a significant portion of the market for Brattleboro representing a very robust portion customer traffic in downtown. In some stores, visitors account for over fifty percent of the customer traffic. Maintaining a visitor traffic base can be “touch and go” but Brattleboro has distinct advantages as a gateway community to Vermont that will never fail to delight the first time visitor interested in an authentic and vibrant downtown. Once visitors are acquainted with downtown, they are browsing the shops. We saw significant evidence of this in the zip code survey work.
- In conclusion, the efforts of Brattleboro should focus now on marketing and retention of existing business with potential recruitment of new business continuing to be a priority albeit one that may take some back seat effort as the economy continues to recover. Brattleboro is truly a great downtown that with even more savvy marketing efforts can emerge as a national leader in fostering independent businesses and a dynamic customer experience.

3.0 Recommendations

The following recommendations are compiled under four strategic themes for Brattleboro. These initiatives are:

- ***Continue Implementing the Branding Strategy***
- ***Initiate a Digital Marketing Strategy***
- ***Reconnecting With Downtown Strategy***
- ***Targeted Marketing and Affinity Strategy***

Each of the strategic themes presented below begins with an explanation of the issues upon which each strategy is based followed by a series of recommendations for implementing each strategy. As this is a retail snapshot study, the descriptions and details of each recommendation are brief. Brattleboro should continue to discuss these recommendations and place them in a timeline priority and work cooperatively to complete an implementation strategy with these recommendations as a foundation.

3.1 Continue Implementing the Branding Strategy

3.1.1 Issues

Brattleboro has launched an excellent brand identity: The One and Only Brattleboro. This brand identity has been deployed in a number of different ways and has tremendous opportunities for expansion. Downtown Brattleboro itself has a wide array of events and activities and is a highly successful district (among the best in the Nation). Despite this success, the community cannot "rest on its laurels" but must continue to expand the branding effort and market to potential customers. Continuing the branding and marketing strategy is made even more important due to the negative impacts of the recession.

The opportunities to market shopping and dining should focus on four desired markets:

- *The local Brattleboro resident* in order to stem some of the retail leakage in certain retail categories and build pride of place. This is pivotally important because many local residents are indeed going to other communities to shop yet customers from the Brattleboro zip code alone comprise 42% of the shoppers in downtown during the survey period.
- *The regional customer* from the primary and secondary trade areas are also important. As the retail base matures in Brattleboro, the community can broaden its appeal as a destination for shopping. This also gives a chance for Brattleboro to cultivate additional customer loyalty to downtown. Roughly one in every five shoppers in downtown Brattleboro are from the surrounding region.
- *The second home market* is unusual in that they are both residents and visitors to Brattleboro. They can be doggedly loyal to downtown or remarkably fickle about their shopping patterns. Furthermore, the second home market has a degree of turnover that doesn't happen with full-time residents. Fortunately, the second home market is eager to hear about opportunities to shop and dine in their second home area and they are likely to have disposable income to do so.

- *The visitor* represents one of the most significant opportunities for a marketing strategy in Brattleboro. Depending on how they are counted, the visitor is likely to range from 25% to 33% of the customer traffic in downtown. Brattleboro is the gateway to Vermont from many parts of New England. Its convenient location with two exits along the visitor "lifeline" Interstate 91, and is home to a host of accommodations options make it an ideal visitor destination. Many visitors need to be clearly directed to the opportunities that exist to experience any destination and the marketing strategy should do everything possible to cultivate this all important market.

3.1.2 Marketing Recommendations

- *Implement way-finding sign and banner system using the brand.* A critical concern for Brattleboro is helping the casual visitor find their way from Interstate 91 into downtown. Signage and banners should be deployed to direct visitors to downtown and once downtown to public parking resources. Area attractions and parks could also be indicated on the wayfinding sign system. Some visitos who experience any frustration in trying to reach a destination will abandon it as "too hard to find" or "too difficult to park." Brattleboro should do everything it can to ameliorate these concerns. Fortunately, one of the interesting byproducts of such a system is that it builds community pride as well. An example of such a system from another community is illustrated below.

Figure 6: Example of wayfinding system from Valley Junction, Iowa.

- *Deploy creative and targeted marketing using digital and more traditional techniques.* Currently Brattleboro has several publications that promote the community including the Chamber of Commerce guide, an older brochure produced by BaBB and a private sector brochure. Moreover, the online resources for shopping and dining are fairly limited. The community should explore a variety of ways to get the word out through print material, collateral items, and online resources that reinforce the brand identity and show a coordinated effort to market the community. Some suggestions to improve the marketing material might include the following:
    - Reinvent the shopping and dining guide to downtown in print form. This might include parking resources, special events, a directory of shops and dining establishments, and other information for visitors.
    - Create a dedicated shopping and dining web page for Brattleboro that profiles all shopping and dining businesses. Also have a section for professional services that branches off from the initial shopping and dining guide. This site might have its own dedicated URL such as "brattleboroshops.com." This will be discussed more in the next section.
    - Continue to market in local publications geared toward promoting the Vermont lifestyle such as Southern Vermont Arts and Living.

- *Consider guerrilla marketing tactics.* Guerrilla marketing understands the need to engage the customer on a creative level without the expense of a traditional marketing budget. The term was coined by Jay Conrad Levinson to explain interactive, unexpected, and unconventional marketing tactics. For Brattleboro these concepts might include the following suggestions:
    - Working with Real Estate professionals to cultivate their understanding and appreciation of downtown. This might include an annual receptions for real estate brokers that market the second homes in the region.
    - Working with Inns and Hotels on creative techniques. One downtown in Virginia worked with local hotels to place an ad for downtown on all of the key cards for local hotels.
    - Partnerships with resorts to cultivate the staff. Rutland has long cultivated a partnership between area results and local businesses at an annual gala.
    - The Welcome Center is at the very doorstep of Brattleboro and should be utilized as a creative resource to engage the visitor.

  To deploy these tactics, Brattleboro may wish to engage a "guerrilla marketing" task force to brain storm ideas. The relative low cost of such a venture allows for a great variety of experimentation.

3.2 Initiate a Digital Marketing Strategy

3.2.1 Issues

There is not a consistent online presence for Brattleboro. Building a Better Brattleboro, the Brattleboro Area Chamber of Commerce, and the Town of Brattleboro have different website looks with much content dedicated to the organizational structure of each partner group. A private venture, the BrattleboroAreaGuide.com produced by Mr. William Hayes of the Artist's Loft offers a "pay to play" site that has perhaps the best content of shopping and dining oriented information in the community. The website ibrattleboro.com is a citizen journalism site rich in local content that could also play a major role in any digital marketing direction. Yet these sites are "islands" among themselves and very little coordination is taking place.

Add to this that there is virtually no social media connection for Brattleboro including facebook, twitter, and other sites and the result is a digital void that needs to be filled.
On the bright side, several downtown businesses have worked with Google maps show some information about their businesses. While far from complete, this is an excellent step in communicating what is offered in downtown. Building a Better Brattleboro is also using e postcards to notify a very large constituent base of regular events and activities downtown. These are excellent tools that should continue to be deployed.

Mobile web applications are the "next big thing" that should be explored. Whether it is Foursquare, Google Goggles, or simply using QR codes. Mobile applications are going to be the emerging theme over the next couple of years. For example, a QR code is a simple bar code that can be scanned by any smart phone that would immediately direct the user to a specific website.

The following recommendations are designed to explore digital options for Brattleboro.

3.2.2 Recommendations

- *Pursue grant funding for a digital marketing initiative for downtown.* Building a Better Brattleboro and its partner organizations should pursue funding to initiate a thorough digital marketing strategy for the community. This would include staffing, building a digital "infrastructure", and deploying a marketing effort that all businesses downtown can potentially engage to tell their message. Funding options for this grant might be the USDA Rural Development Funds, foundation funding, or other creative sources.

- *Host a "meeting of the minds" among partners to consider the protocols and methods to work together on this initiative.* Launching a coordinated strategy will require that each partner organization examine the greater objectives of increasing business in Brattleboro. The "meeting of the minds" would allow for collaboration to happen and consider a distribution of responsibilities and development protocols to ensure that each partner is working together on a cohesive overall strategy.

- *Create a position solely responsible for launching the digital strategy.* This position could be a recent college graduate with both the knowledge of social and other forms of media and the energy to work among different groups.

- *Create a clear downtown guide webpage.* As the steward of downtown, Building a Better Brattleboro is uniquely positioned to launch a downtown guide webpage that offers a complete shopping, dining, events, parking, and resource package for locals and visitors to the community. BaBB's effort in doing this might eventually grow to encompass a larger geography in partnership with the Chamber and the Town. At a minimum, BaBB's downtown site should include the following:

- Shopping/Dining
- Events/Activities
- The Arts/Attractions
- Parking/Maps
- Links
- Accommodations
- Investing/Organizational

Any effort to create such a page should also consider a link-to-link program among businesses in downtown Brattleboro to elevate both the businesses and the district on Google searches. Each business would link to others in the district as well as to a website. Google's search algorithms strongly elevate businesses and districts that are linked.

- *Get a Facebook presence and keep it up to date.* Each of the partner groups should have an active Facebook Page with frequent updates. Facebook is fast replacing traditional webpages for more frequent updates, postings on events, and ways to link friends directly with material.

- *Use Google Analytics.* Any digital strategy should incorporate a way to measure the success of the effort. Never in the history of marketing has there been a more thorough way to understand the impact of any marketing effort than that available through website analytics. Such tracking can be deployed to understand the effect of online efforts such as the E-Postcards sent out by BaBB, it can also be used to see if print collateral, events, particular partnership efforts, and targeted ads are driving traffic to the web. Some additional ideas for using analytics might be:

  - Use Google Analytics (a free program) to track website hits and develop a bi-monthly "web flash" email with statistics related to web traffic including interesting data like number of states, number one market, most clicked out business, and search words used to reach the site. This could be done on the E-Postcard sent out by BaBB through constant contact.

  - Use Google Analytics and the shopping and dining web site to track investment in all other marketing material. Simple tricks like pointing people to a particular page on the site in print ads will allow you to see whether that ad was effective.

- *Work with businesses on "owning" their Google map location*. Google maps allows individual businesses to customize their listing on the map. Businesses may include hours, photos, links to webpages and other pertinent information. By 'owning' the business listing on Google, the community gets the dual benefit of being elevated on Google's search algorithm while providing visitors additional important information.

- *Begin to experiment with online advertising.* The recommendations up to this point are simply building the infrastructure for a thorough online presence for Brattleboro. The community may also want to experiment with online advertising in certain target markets (both geographically and affinity related). These need to be expensive ventures and Brattleboro should carefully consider purchasing pay per view, pay per click, and pay per action options when looking at online ads.

- *Move into mobile web applications for digital strategy.* Smartphones and mobile-based web options are the latest "darling" of the digital media movement. The practicality of looking up information on the go is going to continue to grow as more people purchase smart phones and use these devices to help plot their day-to-day or vacation options. Brattleboro should be on top of these trends including exploring such sites as Foursquare which is a combination game/marketing application, Google Goggles which allows for mobile web users the chance to photograph a location and immediately get information on that site, and the aforementioned scannable QR codes. Some places are already deploying online strategies to direct consumers to convenient parking places in downtown.

3.3 Reconnecting with Downtown Strategy

3.3.1 Issues

Brattleboro is one of the best downtowns in the United States. More than just a quaint visitor shopping district, downtown Brattleboro is a vibrant economic engine for the Town and its citizenry. The community benefits from a number of initiatives and a variety of people/organizations involved in enhancing the community. Yet many in interviews mentioned that some citizens "never go downtown" and others are apathetic about downtown presenting a challenge to remain relevant to the population base of the community. Places like Brattleboro who are successful endure the added challenge of not becoming complacent about success or cavalier about how to coordinate efforts and visions to maximize future investments. To that end, the following recommendations have been formulated.

3.3.2 Recommendations

- *Host a "walkabout" of downtown for Public Officials and key stakeholders*. There is no better way to familiarize people with what is happening in a place than by having a group walking tour. Oftentimes, decisions made in boardrooms suffer from only an abstract idea of what is happening "on the ground." Public officials and stakeholders should have the chance to see how downtown functions, experience the vast array of shopping and dining options, and experience the community through the eyes of a first time visitor.

- *Develop a Master Plan for Downtown.* Unlike a comprehensive plan which is largely a policy document that covers the land use decisions and public policy direction of a community, a Master Plan is an illustrative document that shows where public and private investment can take place on a five, ten, and sometimes twenty time horizon. Such a document shows property owners options for redevelopment of their properties, guides public decision makers on important infrastructure investments, and coordinates this all through a public and open process. The illustration below depicts a similar effort for St. Albans, Vermont that shows current investments, potential redevelopment sites, public improvements, and a host of other recommendations including major parking improvements. Any successful plan of this nature will engage many members of the community and be accompanied by a thorough implementation strategy that tracks the who, when, how, and why for each recommendation.

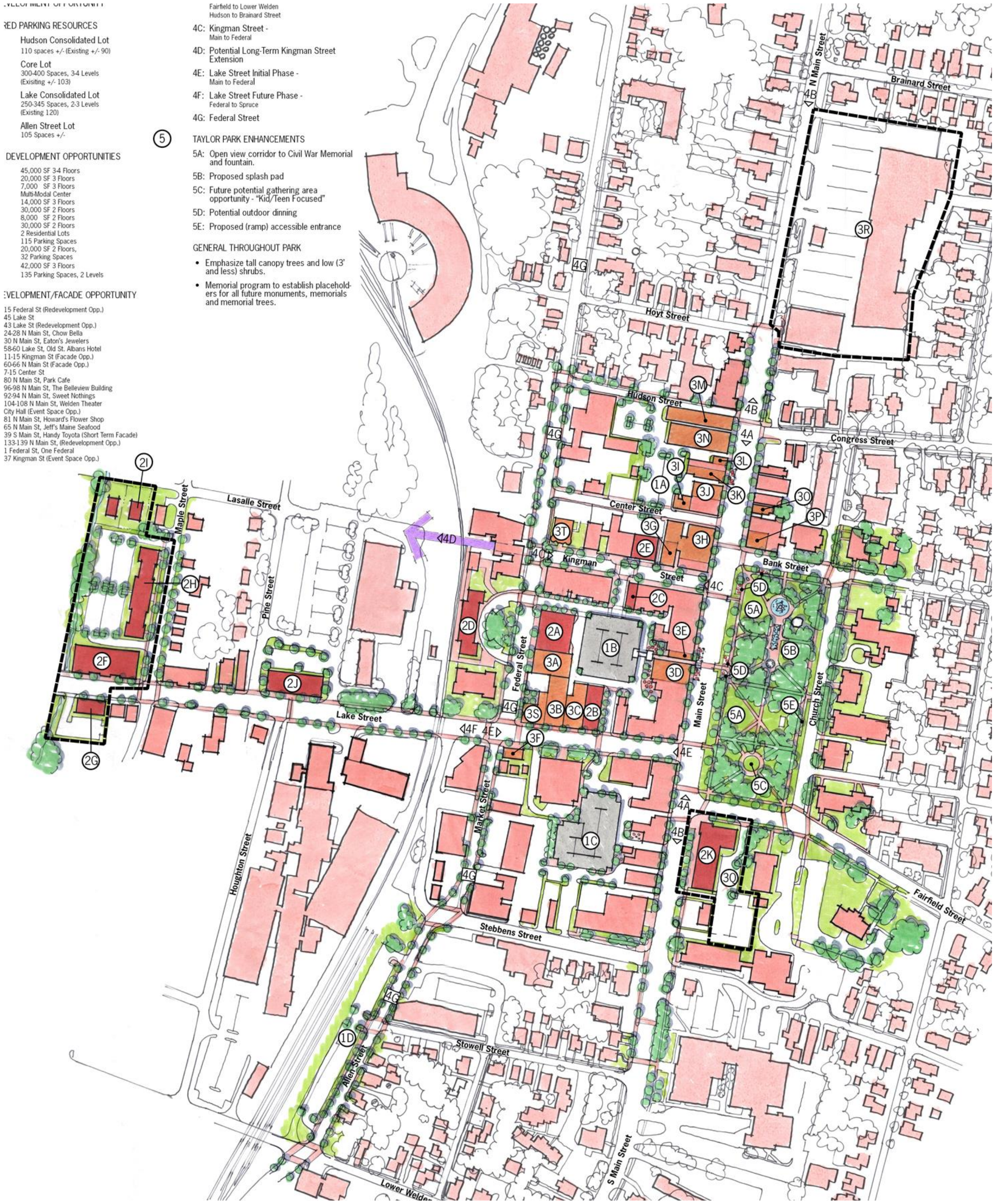

Figure 3: Example of a downtown master plan showing new public and private investment options. This plan was accompanied by a funding strategy and phasing plan.

- *Use some of the marketing efforts above to direct toward the building local pride.* Many communities spend a great deal of time concentrating marketing on how to get "outsiders" into a place at the expense of reminding local residents how special their own place is. The One and Only marketing effort is well suited for a local pride campaign. Brattleboro might even consider naming citizens who contribute to the greater good of the community a "One and Only" in an annual celebration.

- *Quantify how downtown contributes to the Grand List and provide economic indicators*. Many communities in Vermont are taking part in an inventory effort to begin to quantify the indicators that make downtown work. It would be difficult to argue that Downtown Brattleboro is one of the most important (if not the most important) single economic engine in the town. Building a Better Brattleboro should begin to inventory the revenue generated in the downtown district and present that as a baseline to track progress and convey the importance of ensuring that the downtown district stay viable.

- *Consider an annual publication: The Guide to Downtown Brattleboro*. Already mentioned as a potential shopping and dining guide, the community might consider an alternative document that is a guide to downtown. It might provide hints and tips to park, great times to shop, articles on investment opportunities and an annual report of progress on BaBB's efforts.

3.4 Targeted Marketing and Affinity Strategy

3.4.1 Issues

Brattleboro has a wide customer base from the markets indicated in chapter two of this report. The local market is highly segmented with a significant portion of the market likely to continue to seek out discount big-box retailers. However, a more targeted effort toward personal service and uniqueness has a definite appeal with a very key portion of the local and regional market.

From a visitor standpoint, Brattleboro will find it difficult and expensive to directly market to visitors through a geographic model (for example targeting all of Connecticut with a mass advertising campaign). A more successful angle might be to target through affinity groups. This will serve the dual purpose of honing the message to a particular target audience while also cultivating recruitment of like businesses, reinforce existing business, and leverage investments already being made by other attractions. Some suggested affinity groups might include skiers, second home residents, foodies, and small town fans and heritage tourists. The following recommendations explore ways to reach these targets.

3.4.2 Recommendations

- *Continue the Gallery Walk.* The monthly gallery walk is an ideal way to reach residents and visitors interested in the unique offerings of downtown. It is a specifically targeted retail event that is cleverly scheduled to funnel the visitor to downtown restaurants as well. This event is a prime example of affinity marketing.

- *Continue the Literary Festival.* Similarly, the literary festival takes a specific target audience and combines it with the strength of having five bookstores in downtown (and a host of nearby academic institutions) and forging these assets into a dynamic event.

- *Consider an event related to furniture, home furnishing, and Vermont craft for home décor.* Following the model already created by the Gallery Walk and the Literary Festival, Brattleboro should consider a home décor event designed specifically around the second home market and those seeking to find unique furniture and accessories for the home. This would also provide downtown the chance to engage professionals in the region who might work out of their homes and pair them with the shops and galleries downtown. This could eventually morph into a more permanent "Home Emporium" in downtown that brings together crafts people with display rooms and onsite workshops.

- *Find additional artist/studio space in the community (live, work, exhibit?)* Many communities are considering creative spaces within which to house artists and creative business people. The Cotton Mill is a prime example of this already in place in Brattleboro. The community should continue to explore locations for expansion of the idea along with gallery and studio space. This project could also include a central meeting space, support staff, and shared office equipment (such as printers and copiers) to cater to lone wolf consultants and other creative industry professionals. Ideally this space would locate close to or within downtown to generate foot traffic.

- *Consider a dining association or diners club.* The wealth of restaurants in downtown present a great opportunity for a dedicated effort to appeal to "foodies" who are interested in quality ingredients, independent restaurants, and unique food. This concept could easily next into some of the digital and print recommendations above.

- *Market with the Ski websites.* One of the most clean and consistent sites promoting Vermont on the web is www.skivermont.com. It presents a clear and concise message about one of Vermont's most important visitor attractions. Brattleboro should work hard to play a key role in this site.

3.5 Conclusion

Building a Better Brattleboro is a dynamic organization with many key partners. The success of downtown Brattleboro hinges on the ongoing work of this proactive organization that is both visionary and pragmatic. This market snapshot is but one component of many that will go into the ongoing success of one of America's most unique downtowns.

The recommendations above are designed to be a starting point for further discussion and a roadmap for the coming one to three years. As Brattleboro continues its revitalization efforts, it will likely need to revisit this document and continue to make detailed plans for physical improvements through a more comprehensive master plan effort.

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