



College North

neighborhood plan

JULY 15, 2022





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STUDY AREA



SOURCE: City of Appleton



1

Introduction

Purpose of the Plan

- Refine and articulate the vision from the Comprehensive Plan for this district.
- Identify the future opportunities and forces affecting the neighborhood.
- Analyze potential redevelopment options for properties.
- Support equitable and inclusive development and design.
- Leverage relationships between stakeholders to create future opportunities.
- Update the Downtown Market Analysis and prepare a housing strategy for the area.

About the Study

This plan builds upon the vision and goals of the City's Comprehensive Plan. It provides an analysis of redevelopment alternatives that deliberately shape and stimulate the design of development for the neighborhood. Serving as a hub that connects neighborhoods and downtown, the College North Neighborhood is well poised to invigorate private and public investment.

About the Area

The City of Appleton is located in the Fox River Valley of northeastern Wisconsin and has a population of approximately 76,000. Downtown Appleton is the heart of the Fox Valley. As an arts and entertainment district, the area has embraced the creative economic energy of business, tourism, education and love of the Fox River. That has led to resurgence and increased vibrancy of Downtown, drawing praise from SmartAsset in 2020 and naming Appleton as one of the "Most Livable Small Cities".

Planning for the future has proven to result in dividends for the Appleton, making the practice of planning even more important for the College North Neighborhood. Since the completion of the Comprehensive Plan in 2017, the City has experienced an additional \$20 million in tax increment with over 400 new residential units that have either been announced or developed. In addition, new



College North Neighborhood

City of Appleton,
Wisconsin

commercial space has opened across numerous projects. To have a neighborhood by design, rather than by default, the plan needs to leverage this momentum to become a stronger neighborhood.

The College North Neighborhood includes the Appleton Public Library (under major renovation), Transit Center (the central hub of a regional transit system serving a 117 square-mile area with over

200,000 residents), churches, residential, commercial, privately-owned and publicly-owned parking. The neighborhood includes two Tax Incremental Financing Districts (TIF 3 & 11) and much of the area is designated as an Opportunity Zone. All of these assets positions the neighborhood to help stimulate further private investment.

Engagement Initiatives

The City of Appleton launched the College North Neighborhood Plan in Fall 2021 and finished in Summer 2022. The focus of the initiative was to author a neighborhood plan that assembles all of the current initiatives - both private and public - and investigates future opportunities for long-term vibrancy and vitality.

The public engagement process focused on building relationships through one-on-one discussions, community meetings, and a multitude of meetings and interviews to gain input and feedback from people who know the area best—its residents, employees and community leaders.

Steering Committee

A Steering Committee of 14 people met at key points in the process to identify ideas and concerns for the future. Representatives included residents, business/property owners and employees, elected officials, school district, and leaders in the community. Names are listed in the acknowledgments.

Technical Committee

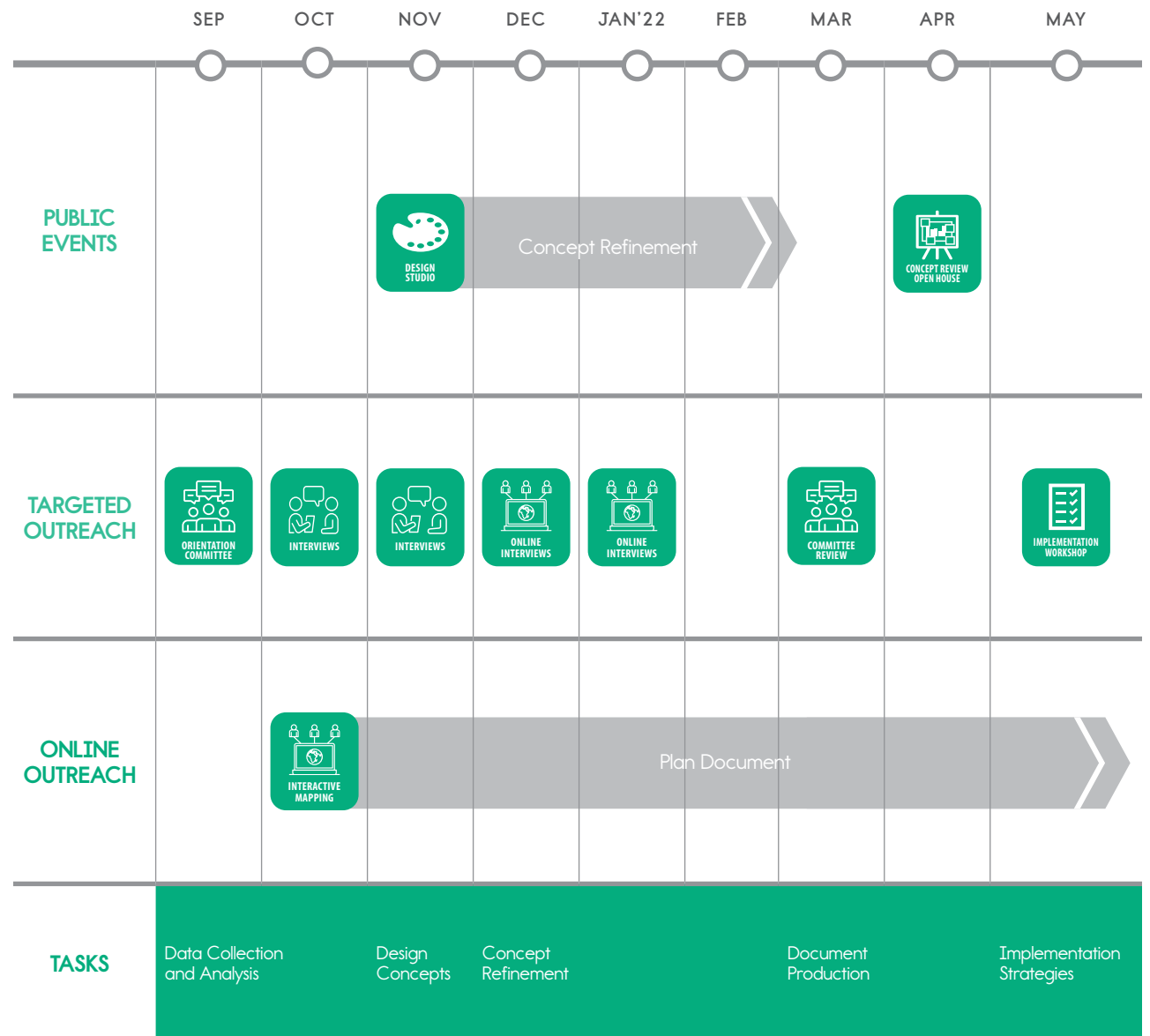
The technical committee included city staff who met often to tailor the process and content as necessary.

Outreach Activities

Altogether, over 2,000 people contributed time and interest to the planning process. Discussions covered broad topics including the influence of the pandemic, people and places, inclusivity, land use, housing, economy, mobility, parks and open spaces, community facilities and more. Public input guided the



FIGURE 1.2: ONLINE INTERACTIVE MAPPING COMMENT LOCATIONS



organization of the plan, resulting in a vision for the future of the neighborhood.

The engagement had three pillars of outreach, including open, targeted and online.

Open Outreach. Open outreach activities were opportunities for anyone to attend. Open Houses, public focus groups and intercept interviews out in the community were examples of open outreach.

Targeted Outreach. Targeted outreach activities were deliberate invitations to stakeholders for them to share their thoughts about the neighborhood. All property owners were mailed two invitations to participate in the planning process.

Online Outreach. Online outreach activities were opportunities for people to engage with online mapping tools and interact via social media.

Past Planning Initiatives

Thank you to the thousands who showed interest in this planning effort and past planning efforts, as these helped shape questions, conversations and priorities:

- 2021 Public Library Design
- 2021 Downtown Streetscape Design Guide
- 2017 City Comprehensive Plan and Downtown Plan
- 2016 Downtown Mobility Plan
- 2016 Trails Master Plan
- 2015 Downtown Parking Study

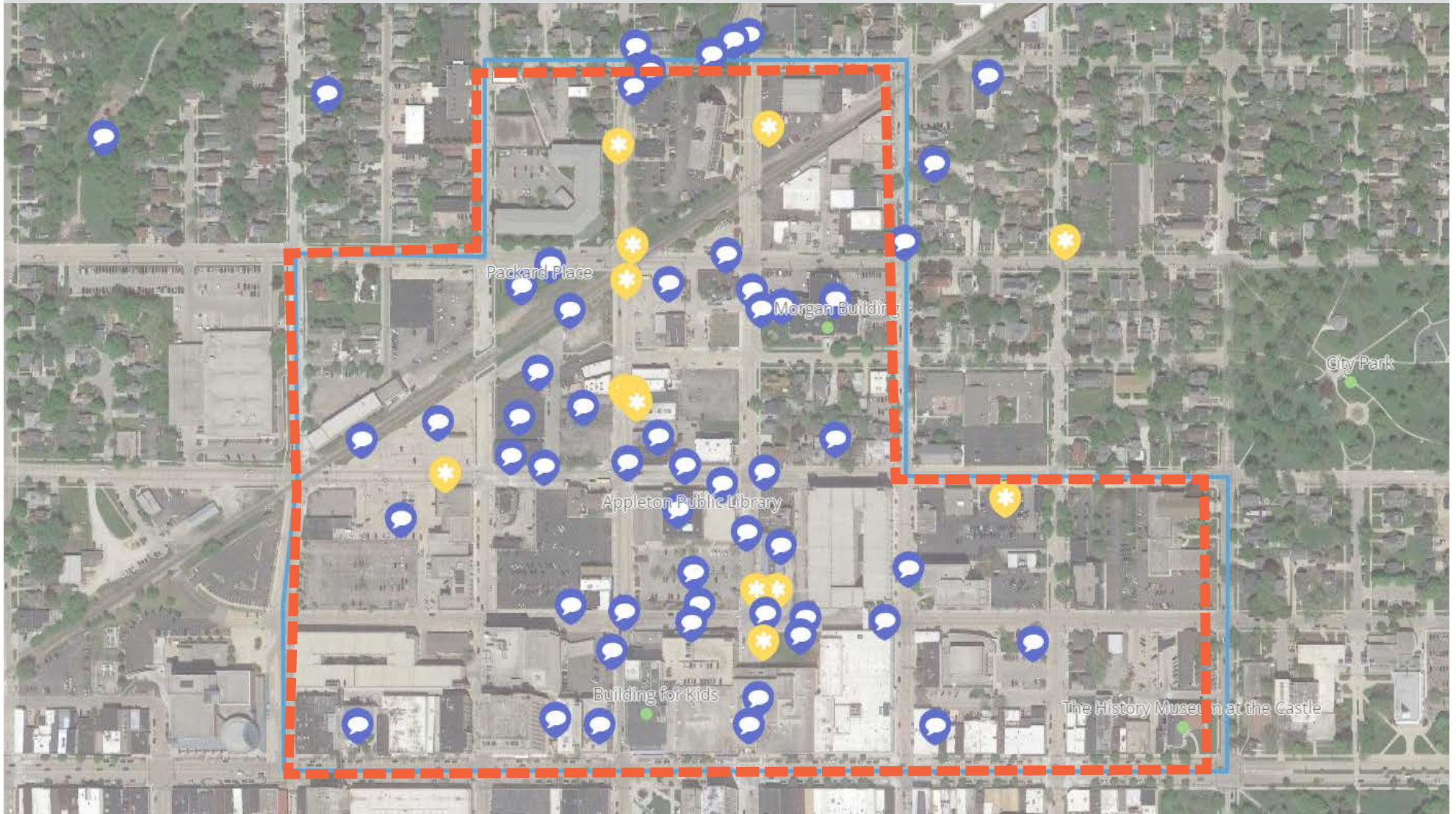


100+
MEETING ATTENDEES

2057
UNIQUE WEBSITE
VISITS

6425
TOTAL WEBSITE VISITS

FIGURE 1.2: ONLINE INTERACTIVE MAPPING COMMENT LOCATIONS



SOURCE: Social Pinpoint - www.planappleton.com (temporary project website)

Planning Concepts

The College North Neighborhood Plan creates a program for concepts and implementation by combining input from the public with a review of both development trends and market potential.

The vision begins with establishing a program, much like an architectural program for a building project. The program sets forth the ingredients of development for both current and future community needs, pending projects and other opportunities. The program is comprised of three separate agendas - Development, Mobility, and Community.



2

Planning
Concepts



DEVELOPMENT

The DEVELOPMENT PROGRAM replaces land uses that are either functionally obsolete or do not achieve full development potential. Identifying sites that can take advantage of Appleton's growth and expanding demand is an important priority for this plan. Key elements include:

- Strengthen the connection between downtown and neighborhoods, while enhancing the current neighborhood
- Explore different development forms unavailable in the area
- Empower private market to lead change
- Complement, not compete with College Avenue

MOBILITY

The MOBILITY PROGRAM leverages existing initiatives, such as the Streetscape Design Guide, and proposes initiatives that improve the circulation, access, utilization and operations in the neighborhood. It is largely based on the area's need for increased connectivity, accessibility and efficiency. Key elements include:

- Improve convenience for moving throughout the area
- Create logical connections to surrounding areas
- Improve the aesthetic appearance of the neighborhood and mobility paths

COMMUNITY

The COMMUNITY PROGRAM is accomplished through achieving the development and mobility agendas. It is based on building desirable outcomes for participants, stakeholders and reinforcing a positive image of the district. Key elements include:

- Create conditions that feel safe, inviting and comfortable
- Increase choices for housing and transportation
- Connect downtown and surrounding neighborhoods
- Inspire stakeholders to become champions for the neighborhood's success

Sites Subject to Change

SUBJECT-TO-CHANGE

If a site is subject-to-change, it means that market forces may influence redirection of the site's use in the future. Sites identified as subject-to-change are not targeted for redevelopment. Instead these are areas that could be explored with future scenarios for preservation, reuse or redevelopment. Conditions that lead to becoming a site that is subject-to-change include:

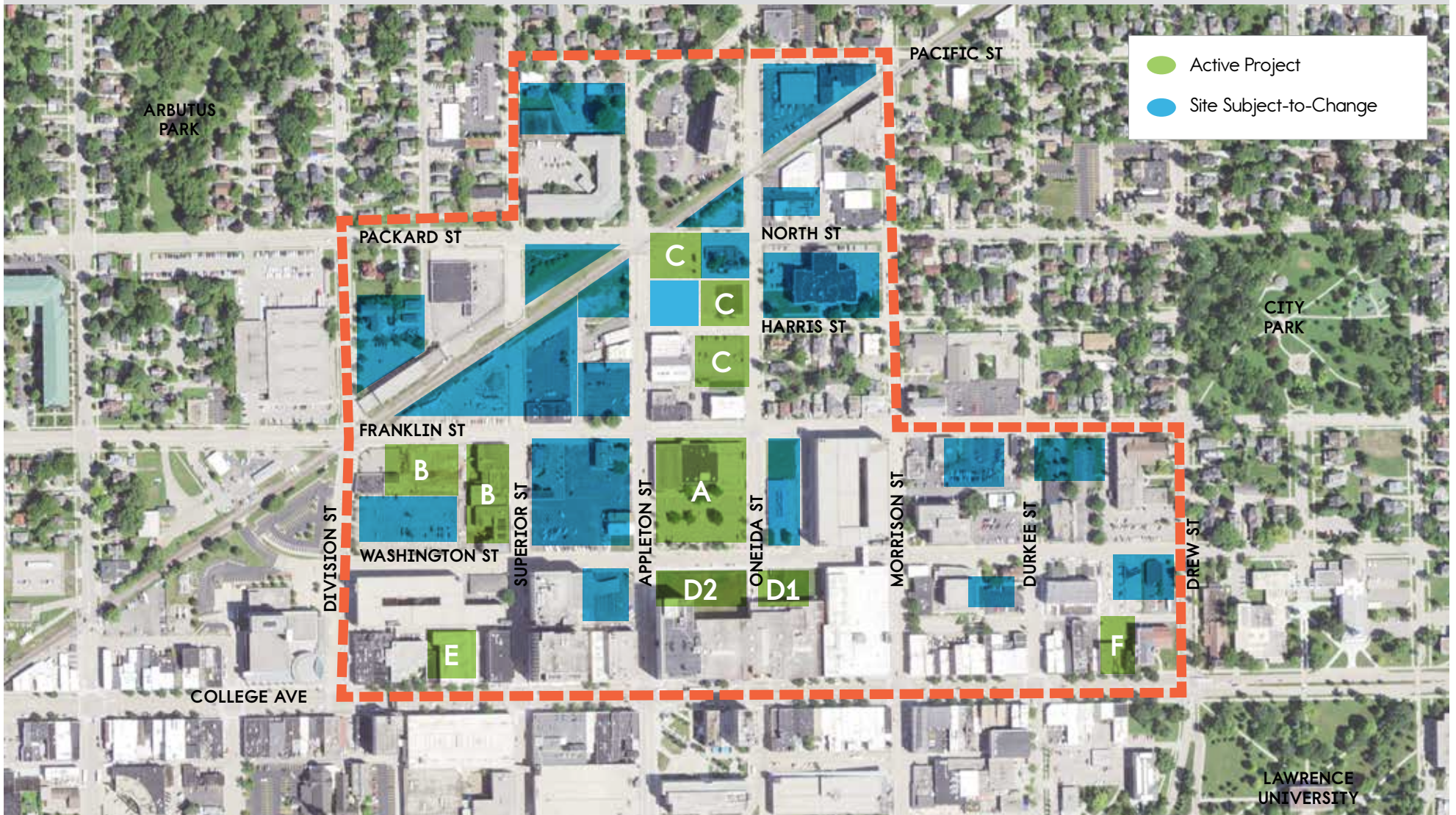
- Market exists for higher intensity use
- Vacant building
- Open or vacant lots
- Underused site
- Obsolete or incompatible uses
- Surface parking areas

ACTIVE PROJECTS

The neighborhood has many sites experiencing development activity or with recently completed development. Identified sites include projects that are under construction, recently built, or have an approved development agreement.

- A. Appleton Public Library
- B. Crescent Lofts, recently completed
- C. Rise Apartments
- D. Merge Development (phases 1+2)
- E. Park Central
- F. 320 E. College Avenue

MAP 2.1: SITES SUBJECT-TO-CHANGE



Source: RDG Planning & Design, Public Input

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Development Concepts



Development Concepts

The College North Neighborhood Plan explores concepts for future development that intend to unite each site to its surrounding context, while maximizing outcomes. Several sites in the neighborhood are candidates for redirection. Some sites are publicly-owned and may be redeveloped for private use. Others are privately-owned and might be redeveloped.

Property owners and developers, in responding to the development concepts, may take different, equally valid, approaches to opportunity sites. Therefore, the plan explores possibilities for redevelopment and suggests patterns that connect each site.

This section explores the potential of these opportunity sites, including redevelopment and reuse.

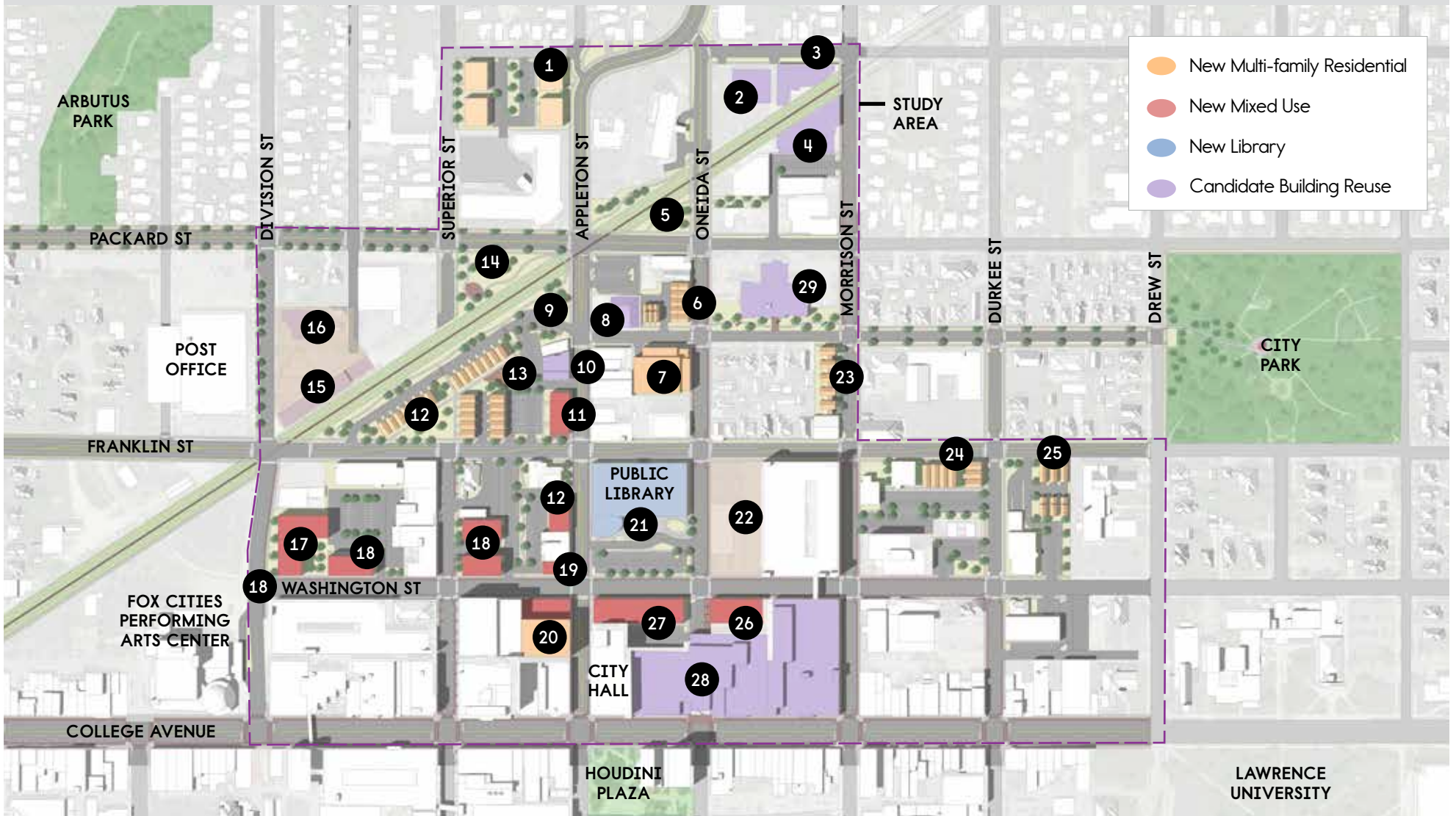
CONCEPTS

Concepts are just that, ideas for the future with the purpose of improving the quality of the area. Development concepts for the College North Neighborhood includes twenty eight possible key initiatives, which are noted in Map 2.2 and described herein.

1. Senior-Oriented Living
2. Existing Automotive Reuse
3. Existing Reuse
4. AASD Maintenance Facility Reuse

5. Triangle Park
6. Townhomes
7. Multi-Family
8. Development Site
9. Parking Lot
10. Building Rehabilitation
11. Mixed Use Project
12. Union Springs Development
13. Union Springs Park
14. Packard Place
15. Building Reuse or Redevelopment
16. Human Services Campus
17. Multi-Family
18. Development
19. Commercial Corner
20. Corner Redevelopment
21. Appleton Public Library
22. Public Transit Redevelopment
23. Morrison Street Infill
24. Durkee Street Infill
25. Franklin Street Infill
26. Merge Phase 1
27. Merge Phase 2
28. City Center Plaza

MAP 2.2: DEVELOPMENT CONCEPTS



Source: RDG Planning & Design

#1. Senior-Oriented Living

The buildings on the 200 Block of W. Pacific Street, north of the Appleton Retirement Community Center, include a mix of single-family homes and small multi-family structures. The properties are bounded by higher intensity uses and daily traffic with relative close proximity to downtown services. Any future reuse of the site a higher intensity use would be compatible with its surroundings. This plan presents a scenario for adding senior-assisted or independent living that could be a congregate “small house” setting (8 to 12 units per building) or townhouses. Desirable features include (1) buildings oriented to the street with parking in the interior and (2) logical connections to neighboring properties.

Implementation. Building a higher intensity use may necessitate that properties be assembled by an entity that can hold properties. Sometimes the private sector is hesitant to take on the risk of property owners unwilling to transfer their property.

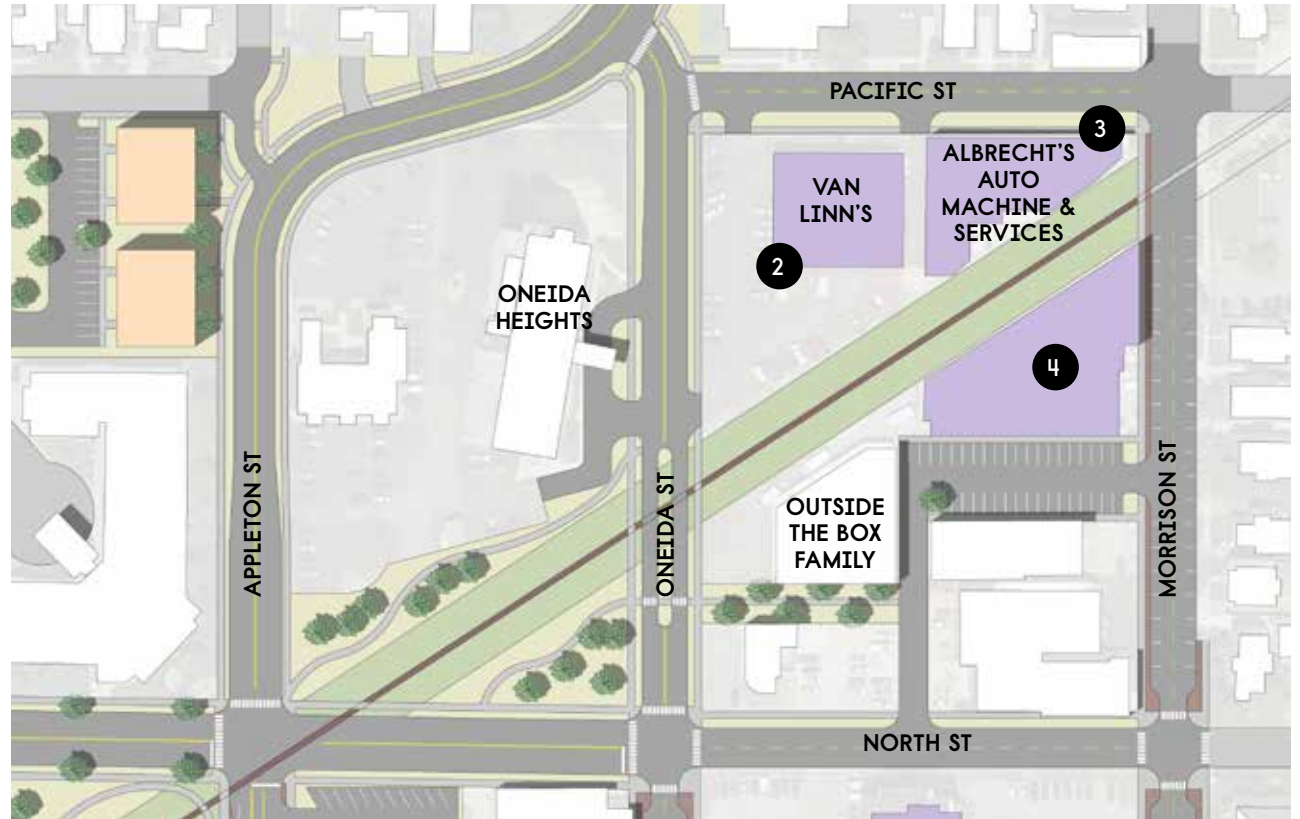


#2/3/4. Building Reuse

The Plan recognizes that, over time, buildings get reused for another purpose or their site gets redeveloped altogether. This Plan first considers options of reuse before redevelopment.

2. **Existing Automotive Reuse.** Continued. Redevelopment options may lean towards single-level cottage homes for older adults with pathways to the Oneida Heights campus.
3. **Existing Reuse.** The existing building could possibly be reused as an amenity for nearby senior housing campus, such as a center for activities.
4. **AASD Maintenance Facility Reuse.** Potential reuses include residential conversion, start-up space for small businesses, crafts industrial uses, artist studios and a range of similar uses.

Additional site area improvements include defining attractive pathways that link parking areas to Oneida Street.

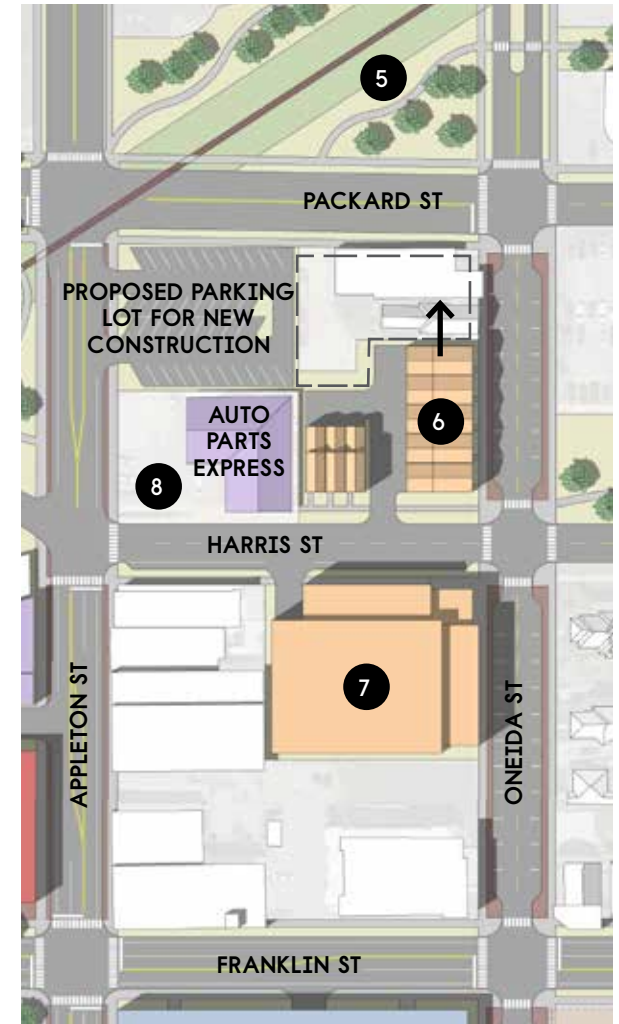


- | | |
|---|---------------------------|
| 2 | Possible Redevelopment |
| 3 | Community Building |
| 4 | AASD Maintenance Building |

#5/6/7/8. Franklin to Tracks

Properties on Oneida Streets, between Franklin and Packard Streets are under review for future housing. With these changes, other nearby sites may face redirection.

5. **New! Triangle Park.** Replace the existing surface parking with an open space to buffer development from the railroad. The park provides greenspace for the nearby housing development and becomes part of the raiiside greenway with plantings and ornamental fence.
6. **New! Townhomes.** Proposed townhome development in its planning stage in 2022. The project is oriented to low- and moderate-income (LMI) persons and is being financed through Low-Income Housing Tax Credit (LIHTC). This plan explores a future phase of townhomes extending to Packard Street.
7. **New! Multi-Family.** Proposed townhome and multi-family development with enclosed parking. Project is by the same developer as #6.
8. **New! Development Site.** Redirection may include new commercial or mixed use development. Site reuse could include restoration of the building façade or adaptive reuse.



- | | |
|---|------------------|
| 5 | Triangle Park |
| 6 | Townhomes |
| 7 | Multi-family |
| 8 | Development Site |

#9/10/11. Union Springs Triangle

The properties bounded by Appleton Street, Franklin Street and the railroad tracks offer a significant opportunity area for new development that, if planned in coordination, can include complementary features that serve future residents and businesses.

9. **Parking Lot.** Aligning Harris Street to Rookie's parking lot will strengthen circulation to future development and Franklin Street. Redesigning the lot will increase parking capacity area businesses. The city-owned lot next to the railroad tracks would be folded into the site design and may include a formal entrance feature to downtown.
10. **Building Rehabilitation.** Retention and rehabilitation of existing two-story commercial building is a priority as is. Renovating the upper levels for residential.
11. **New! Mixed Use Project.** The northwest corner of Franklin and Appleton Streets wants a project that holds the corner, meaning that a new project is built to property line. The multi-story building should activate the street level with commercial uses and have upper story residential. The building's architectural design should complement nearby structures. Behind the building is a shared parking lot between development projects.



9	Parking Lot
10	Building rehabilitation
11	New Mixed Use Project
12	Union Springs Development
13	Union Springs Park



#12. Union Springs Development

The Union Springs Development is a conceptual design for introducing new housing options near downtown by combining surface parking lots and vacating a spur of Superior Street into a single development site. The concept shows new medium-density residential development west of Kalata Place between Franklin Street and railroad, common open space, greenways and about 24 townhouse/rowhouse units. Key elements include:

- Housing
- Outdoor gathering space (s)
- Greenway trail parallel to the railroad tracks with possible parking
- Vacation of Superior Street right of way, north of Franklin Street and vacation of Kalata Place right of way





LOOKING NORTHWEST

#13. Union Springs Park

Union Springs Park is listed as a Local Historic Site by the Appleton Historic Preservation Commission. Their record states, "The 535-foot deep artesian well supplied clean water to the Lutz Ice Company plant at a rate of 100 gallons per minute which allowed the company to manufacture 60 to 65 tons of ice every day which was crushed into ice cubes at a rate of 128 ice cubes every three minutes and then packaged for its customers in Fox River Valley (City of Appleton)."

Today, the site is relatively unknown to many in the community. While the well itself is not historical, the site's story should be celebrated and represented in a 21st century image through public art. The images provided as precedent imagery stimulate further discussion.



13 Union Springs Park

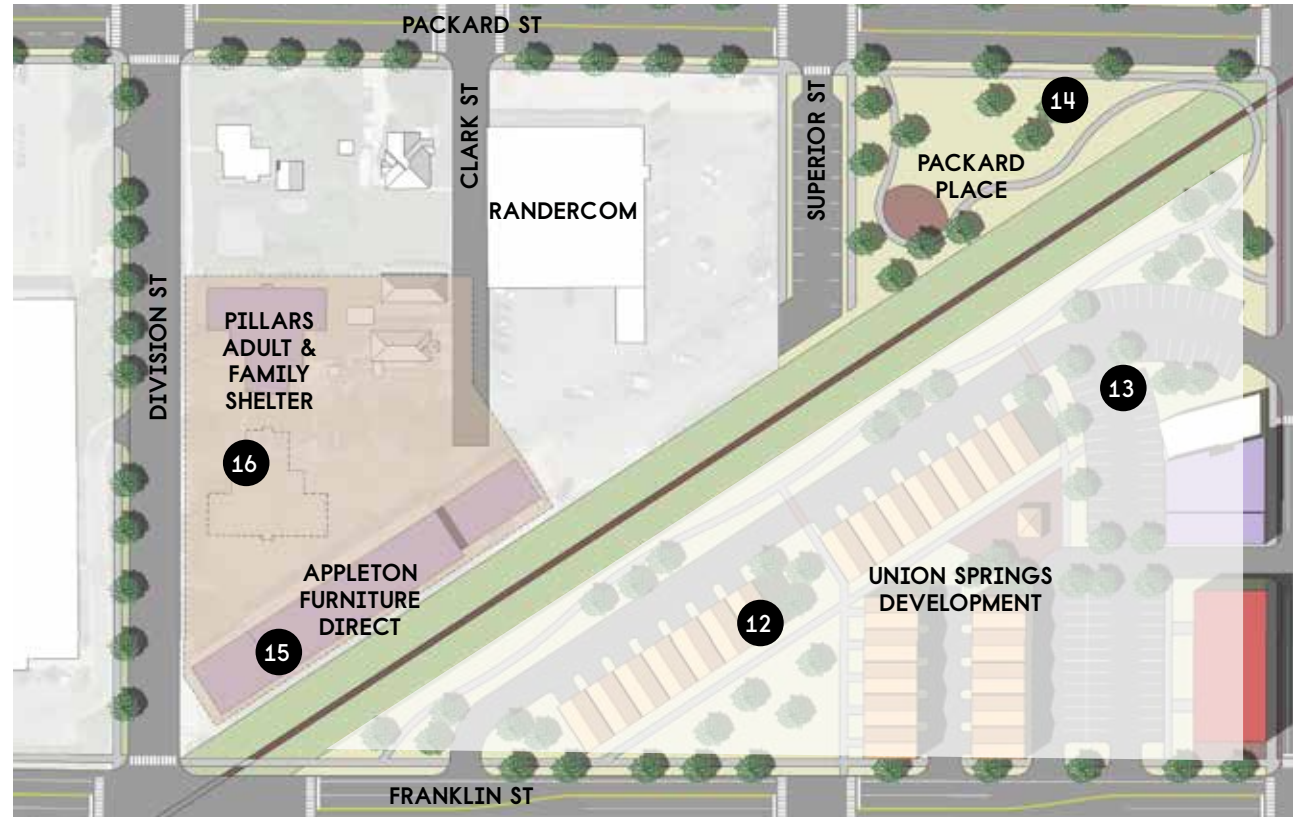


#14/15/16. Packard Triangle

The Packard Triangle includes the Packard Park and the area between Division Street and railroad.

Concepts for this area include:

14. **Packard Place.** Preservation, expansion and development of existing neighborhood park, created by adding east half of Superior Street right-of-way. West half of right-of-way may be conveyed to adjacent property to provide access to Packard Street or maintained as public open space. Use to expand park does not necessarily require street vacation.
15. **Building Reuse or Redevelopment.** The warehouse building along the railroad tracks may be repurposed. The site is an option for a possible passenger rail station or human service campus.
16. **Human Services Campus.** The property south of Pillars could include a future human services campus that supports the needs of people in the community. For illustration, the footprint of the Pillars' building is mirrored on the site to show that their space could double from its current size on the existing site.



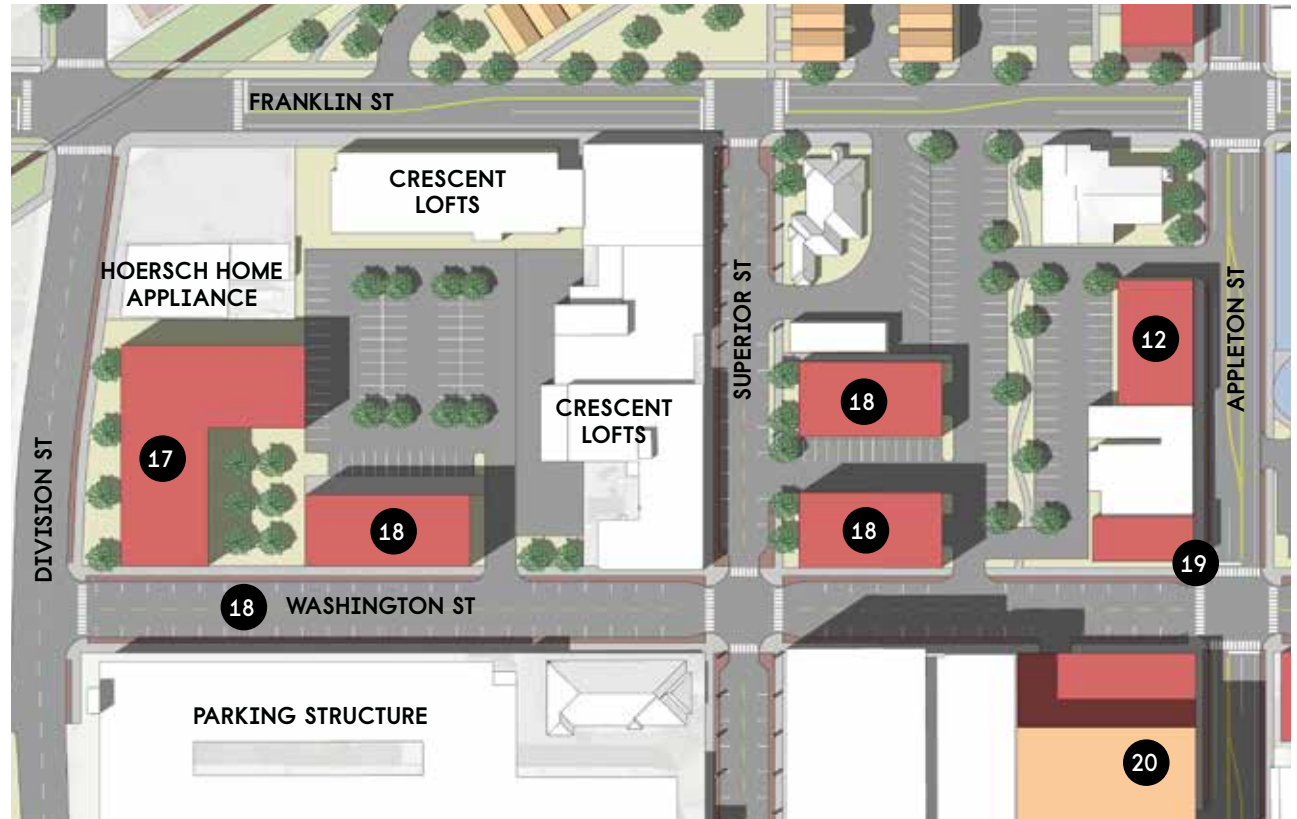
- | | |
|----|---------------------------|
| 12 | Union Springs Development |
| 13 | Union Springs Park |
| 14 | Packard Place |
| 15 | Building Reuse |
| 16 | Human Services Campus |



#17/18/19/20. Washington Corridor

A redeveloped Washington Street is imagined as a parallel mixed use corridor to College Avenue, having calmer activity and opportunities for growth in services and living spaces.

17. **New! Multi-Family.** The existing surface parking is not an optimal use and would be better as multi-family residential or mixed use. Activating the street with new development will strengthen the overall urban character of downtown.
18. **New! Development.** The prototypical building footprint includes lower-level commercial tenant space, covered parking and upper-level residential. The parking lot should be redesigned to improve efficiency (parking yield and circulation).
19. **New! Commercial Corner.** Introduce a new infill commercial project at the corner of Appleton and Washington Street while retaining nearby commercial buildings.
20. **Corner Redevelopment.** The concept shows a multi-story building that can be tiered back after three or five levels to provide rooftop activities. The business and parking could be incorporated into a main level, if desired. The building should engage both Appleton and Washington Streets.



17	Multi-Family
18	Washington Street Development
19	Commercial Corner
20	Corner Redevelopment





LOOKING NORTHEAST



#21. Appleton Public Library

The Appleton City Library is expanding from 86,000 square feet to 110,000 square feet to better serve the community. The ~\$39 million project began in 2022 and will be completed in 2023.

The project represents the City's commitment to the neighborhood and the new library will undoubtedly be a catalyst for future private investment.

Architectural renderings are courtesy of Skidmore, Owings and Merrill (SOM).

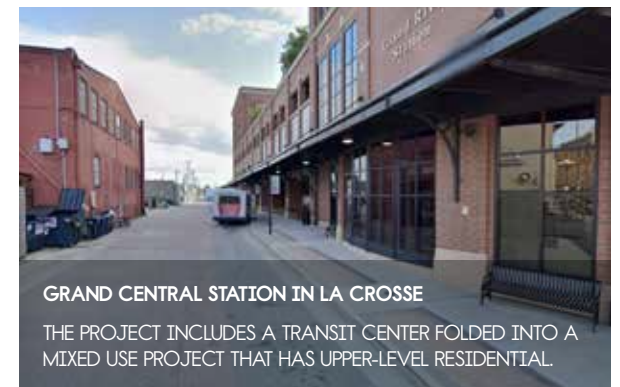


#22. Public Transit Redevelopment

The existing transit station is in need of significant renovation and improvements to meet the growing needs of the community. It does not meet the needs of its customers or the staff operating the facility. It is believed that the site remains a viable location for transit, the vacancy on the balance of the block and the building's obsolescence suggest redirection for the site's future.

The plan proposes a higher-intense use, a new mixed-use project that replaces the existing building and incorporates a main-level transit center and commercial tenant spaces. Upper levels could include residential units, offices, and/or lodging. This concept models itself on other Wisconsin communities and around the country, including:

- La Crosse, Wisconsin
- Madison (Southside), Wisconsin
- Eau Claire, Wisconsin
- Raleigh, North Carolina



#23/24/25. Infill Residential

The planning process considered sites within the neighborhood that may not be at their optimal use. While several individual sites are candidates for redevelopment, the Plan's approach was to identify clusters of properties that could be assembled and redeveloped as a unified project. Considering the principle of this Plan to introduce new options for housing near downtown, the following concepts favor townhome development although multi-family structures are eligible alternatives.

23. **Morrison Street Infill.** The concept replaces a surface parking lot, a home converted to multi-family and a vacant office structure.
24. **Durkee Street Infill.** The concept replaces surface parking lots, and small office building.
25. **Franklin Street Infill.** The concept redirects surface parking for U.S. Bank.

Redevelopment for Parking. The practice of acquiring property and demolishing the site for surface parking is discouraged. Parking should be addressed for all of downtown environs, exploring options for shared parking, signage and management. This may require agreements between private owners, possibly supported by the city, to optimize the use of land and parking.



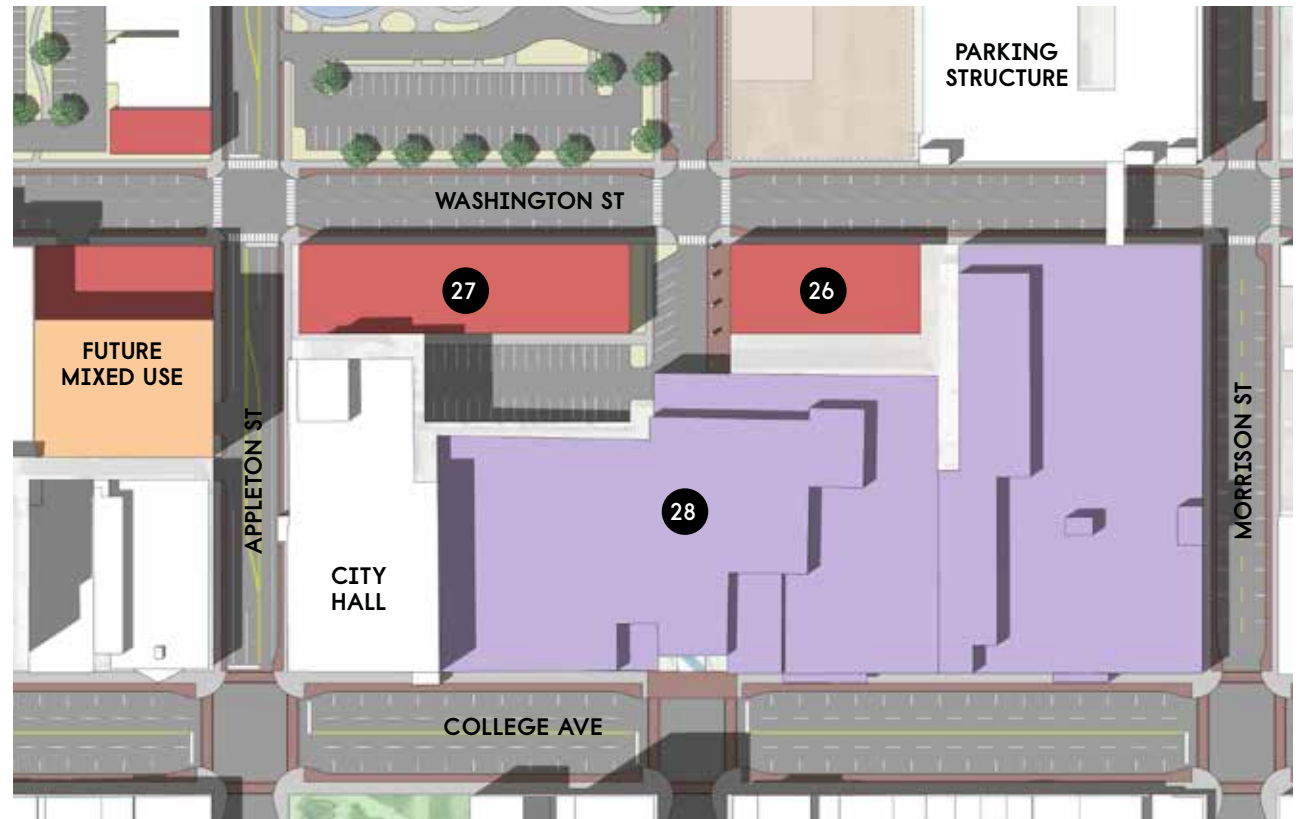
#26/27/28. City Center

The area north of City Center is experiencing new investment, beginning with planned major renovations for the Appleton Public Library.

26. **Merge Phase 1.** Immediately north of the City Center on lots now vacant following the demolition of a former hotel and parking structure, is a new mixed use project proposed by Merge Development (26 and 27) that will include commercial and multi-family units. The success of these projects will undoubtedly increase interest in a renewed direction for City Center Plaza.
27. **Merge Phase 2.** The second phase of the Merge project is expected to be five stories with 75 units and ground level commercial space.
28. **City Center Plaza.** Addressed by the City's Downtown Plan, the City Center is a key feature of the downtown redevelopment framework in the creation of a linear pedestrian friendly corridor more prominently linking the library to College Avenue."

Adaptive enhancements should include:

- Adding wayfinding.
- Remodeling the interior space to direct people between College Avenue and the Public Library.
- Enhancing the north entrance of City Center in tandem with the Merge Development project.



26	Merge Phase 1
27	Merge Phase 2
28	City Center Plaza



The public's interest for making Downtown Appleton an even more remarkable destination includes the success of the City Center. The community's general perception is that market forces will not naturally result in the building's revitalization and that intervention from the private and public sectors are necessary to improve its function and vitality.

Like the College North Neighborhood Plan, the City Center Plaza needs a master plan to guide initiatives and show the various stakeholders future possibilities to give the building new life and new purpose. **Elements of the City Center Master Plan may include:**

Elements of the City Center Master Plan may include:

- Evaluate revenues, expenditures, and financial capacities.
- Evaluate existing conditions and architectural character.
- Engage tenants and community
- Reprogramming of spaces and tenancy.
 - Common areas
 - Tenant possibilities that make the facility an attraction generating foot traffic. Uses may be performance spaces, ice rink, public market, immersive museum and more.
- Conceptual designs of spaces.
- Possible branding and marketing strategies.
- Implementation steps, including a market study that tests the viability of preferred future uses.



Development Policies

The College North Neighborhood Plan supports higher intensity development projects rather than single-family or single-story projects. For the purpose of this neighborhood, the design of the first 20-feet of the building's elevation is most critical and should orient to pedestrians.

Also, this plan supports the development of mixed use buildings with retail-ready spaces on the first floor. This means that if the market demand is not mature to support commercial tenants at the time of opening, then the space can be leased for residential until the market can support commercial tenancy.

Projects should:

- Incorporate a residential use
- Be a minimum of three stories
- Engage the sidewalk and street level
- Build to the property line
- Reinforce the character of the neighborhood

Projects should not:

- Be built with long, blank walls along the street
- Be single-story or single-family homes
- Include excessive surface parking

Townhomes Infill



Mixed Use and Multi-family Infill Examples



A Case for More Housing Options in Downtown Appleton

Planners are deeply involved in thinking about cities and their fundamental importance to our society. The “return to the city” by specific segments of our urban population, particularly young professionals and downsizing baby boomers, has spurred momentum for downtowns.

In cities throughout the Midwest, downtown and midtown development have replaced (or at least complemented) suburban apartment complexes as the preferred rental housing environment for significant market groups. Surveys and observed preferences of the millennial demographic indicate an appreciation for urban amenities – restaurants and shops within walking distance, active transportation, urban public spaces, the pleasures of unplanned but rewarding interaction with other people. Urban quality has also been attractive to people at the other end of the consumer age spectrum – a certain percentage of baby boomers who are downsizing and equally interested in city living,

with less routine driving and more features nearby. City planners across the country ask several major questions: What happens when millennials have kids and start families? Will the apartments and other multi-story housing types that appeal to relatively young, mostly empty-nester individuals and households continue to be attractive when the nests are no longer empty? Are cities building effectively for the market of the future as well as the market of the present? How can scarce resources be used most efficiently?

The central city revitalization trend that is occurring now is a fragile thing, and it may not be as secure as people like to think it is. If cities don't develop the housing types, neighborhood environments, schools and support facilities that young families need in our reinvigorated cities, those families will find what they need elsewhere – leaving, albeit reluctantly in many cases, for more suburban settings.

From a development perspective, what types of housing products are going to meet these

needs and retain these households in the cities that have come so far during the last two decades? While some answers are elusive, some are around us and quite evident.

Demonstration: Wauwatosa, Wisconsin. The population in Wauwatosa, a first-tier suburb of Milwaukee, peaked in 1970 at 58,676, as the number of families with school age baby boomers peaked. The city experienced a long, consistent population decline over the next 40 years to 46,400 in 2010, but Census data indicate that the trend has turned around. The North Avenue area, a mixed-use corridor through the center of the community, is flanked on both sides by a grid of tree-lined blocks of detached single-family houses on 40 foot lots, at a net density of 9 units per acre. Areas of the neighborhood report 60 kids on a block. These small lots with their lovely detached urban houses, along with other progressive policies, are fueling the population resurgence of Wauwatosa. The same phenomenon is occurring in high demand in urban neighborhoods like Beaverdale in Des Moines

and Dundee in Omaha.

It is no wonder that this kind of development program characterizes one of the most successful projects in the nation at establishing a new and highly valued city neighborhood – Stapleton in Denver – is defined by urban family development with varied housing options..

Stapleton has a mix of other housing types, and attached homes are nicely integrated into some of the project's streets. But it is the single-family form, usually on small lots, that establishes both the development's character and, in the opinion of plan's authors, its long-term viability. The principal idea for the Union Springs Development Concept allows us to establish a similar neighborhood on the edge of Appleton's Downtown. In the city's market, and in most midwestern cities, communities must recognize that families gravitate toward single-family homes rather than the rowhouses, townhouses, and multi-story buildings more characteristic of some larger cities. Yet,

Appleton is missing rowhouses and townhouses near downtown. It may be unrealistic to try to offer limited living options to home buyers, especially when they have other affordable options in the area. Yet, many of these same contemporary families also are not drawn to big lots, big lawns, and big spaces between homes and destinations.

Communities know from the experience of both traditional and "neo-traditional" neighborhoods that an appropriate mix of housing types defined by a relatively high-density single-family component appear to offer the right combination of community and privacy, of space and density. The vision and objective of this opportunity must be to keep people in the city, near downtown if desired, as their families grow and their household needs change, to provide settings for people of all ages, and to fill neighborhood streets and spaces with the sound of children. The principal concept has been carefully designed to do precisely that. We hope that you will view it through that prism.

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Mobility

Mobility Concepts

The neighborhood's streets communicate the district's health and character to residents and customers. Future mobility improvements should improve the circulation of the neighborhood, connecting people comfortably from place to place. Also, mobility enhancements should support the business community by creating a street with detail, color and customer accommodations.

The key concepts for improving mobility for the College North Neighborhood was born out of the public engagement process. This process led to a combination of design features and themes united by the dual ideas of being SAFE and MEMORABLE.

CONCEPTS

Concepts are just that, ideas for the future with the purpose of improving the quality of the area. Mobility concepts for the College North Neighborhood revolve around twelve key initiatives, which are noted in Map 2.3 and described herein.

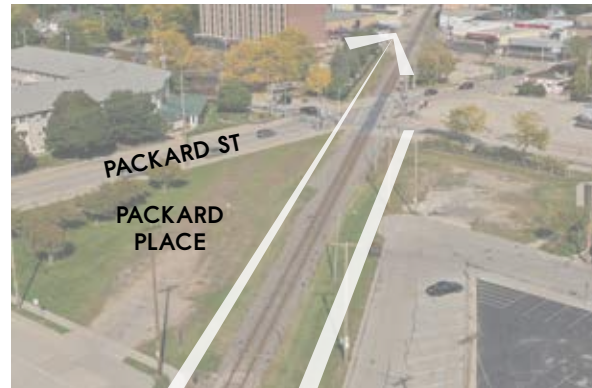
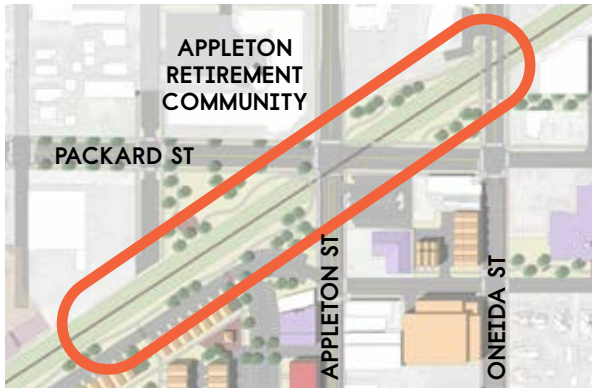
1. Build Railside North Path
2. Build Railside South Path
3. Finish Appleton Street Streetscape
4. Extend Harris Street
5. Retrofit Harris Street as a "Green Street"
6. Create a Design Feature at City Park
7. Redesign Surface Parking Lots
8. Public Transit Redevelopment
9. Upgrade Oneida Street
10. Improve the City Center Gateway Entrance
11. Design City Center Plaza Pedestrian Street
12. Strengthen Connections to Parks



MAP 2.3: MOBILITY CONCEPTS

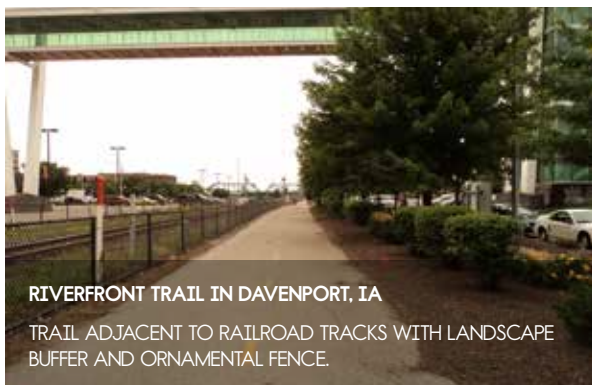


SOURCE: RDG Planning & Design, City of Appleton



#1/2. Railside Pathways

The railside pathway, as demonstrated in Davenport (Iowa), includes an attractive fence, trail, and buffered landscape. The fence helps prevent trespassing and improves the safety of travelers. The buffered landscape includes turf between the trail and the tracks. Also, taller plantings buffer the tracks from nearby development.



RIVERFRONT TRAIL IN DAVENPORT, IA
TRAIL ADJACENT TO RAILROAD TRACKS WITH LANDSCAPE BUFFER AND ORNAMENTAL FENCE.

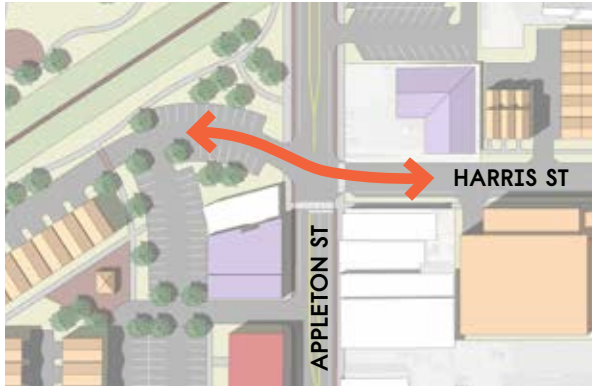
Building a parallel trail to the tracks is shown in the City's Trail Master Plan (2017). This plan recommends that the path be placed on the northside of the tracks to allow for greater continuity and fewer obstructions.

1. **Build Railside North Path.** Investigate a shared use path to connect residents from Oneida Heights to downtown. This initiative responds to public input for improving access for residents living at the facility.
2. **Build Railside South Path.** Shared use path between Morrison Street and Performing Arts Center. Key element of Art to Park loop connecting to City Park and the Lawrence campus. Developed south of railroad ROW line with ornamental fence separation from the railroad.

#3. Finish Appleton Street Streetscape

Rebuilding Appleton Street from College Avenue to Atlantic Street began in 2022 with functional and streetscape improvements. The realignment at Oneida Street and Pacific Street will continue the City's effort of converting the one-way streets to two-way.

Appleton Street is the north-south spine for the College North Neighborhood. The public's investment in refreshing Appleton Street will help create a private market reaction of new investment.



#4. Extend Harris Street

Aligning Harris Street to the proposed Union Spring Development Concept limits the number of conflict points along Appleton Street while providing a pathway that can reconnect to Franklin Street to the west.

#5. Retrofit Harris Street as a “Green Street”

Strengthening the “green” along Harris Street will continue to set this area apart from its surrounding. The tree-lined route has a few gaps that can be filled with new trees. Intersections could host flower gardens arching around the intersection, becoming antecedents to the proposed gateway at Drew Street. Other elements may include pedestrian street lighting and wayfinding.

#6. Create a Design Feature at City Park

Creating a gateway at Harris Street will strengthen the connection to City Park. Improvements may include a redesign of the entrance sign at City Park and its immediate landscape. Design features can be applied at all corners of the intersection and be as simple as flower beds within an arch.



#7. Redesign Surface Parking Lots

Assessing the efficiency of the existing parking design and reconfiguring surface lots to improve circulation and parking will improve the yield of parking in the area. Private property owners could finance the improvements through agreements with developers, leasing spaces as shared parking stalls. Daytime parking demand is generated by commercial uses, while nighttime demand is generated by residents and entertainment. Individual peak demands usually offset, allowing parking to be shared between peak demand users.



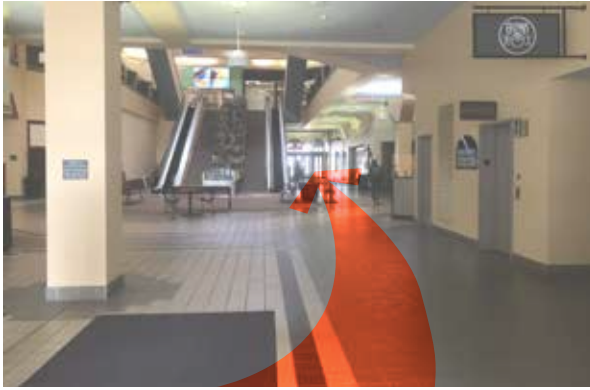
#8. Public Transit Redevelopment

Replacing the current Transit Center, which does not currently meet customer demands or operational needs, with a new mixed use project will improve the performance of the site and transit services. The facility is imagined as a multi-story building with a first floor Transit Center and commercial uses and an upper-story of housing and/or commercial space.



#9. Upgrade Oneida Street and City Center Plaza

Improvement of Oneida Street will support adjacent library, Transit Center redevelopment and Merge projects. Elements include streetscape, on-street parking and pedestrian friendly features.



#10. Design the Interior of the City Center with a Logical Pathway

Redesign of central space in City Center to provide clearer and more attractive pedestrian continuity to College Avenue corridor.



#11. Improve the City Center's Gateway Entrance

A redesigned main entrance to City Center Plaza - including new architectural features on the building and new streetscape features on the plaza - will enhance the appeal for those arriving here. Other enhancements can include pedestrian actuated signal, wayfinding kiosk, suspended lighting over the intersection and architectural lighting, with more purposeful design. Any and all of these will help prioritize pedestrians over vehicles and give pedestrian crossings a strong presence.



#12. Greenway Link to Parks.

Arbutus Park. Greenway and sidepath on south side to Packard. May involve change in curblines or modification of Post Office parking. A new pedestrian crossing near the park can include a beacon signal to alert motorists about the presence of people crossing to the street to the park. Also, improvements to the downhill access to park level from street will improve convenience for users.

Jones Park. As the College North Neighborhood develops, Superior Street south of College Avenue could be enhanced to strengthen the connection to the north.

Mobility Policies

The City is committed to making the College North Neighborhood a complete multi-modal experience, meaning that people can move around the City by their preferred mode of transportation. Many of the policies within this section reinforce existing City policy and best practices. Three major policy initiatives for the neighborhood include:

- Implement the Downtown Streetscape Design Guide
- Monitor parking usage and management
- Evaluate options for passenger rail station

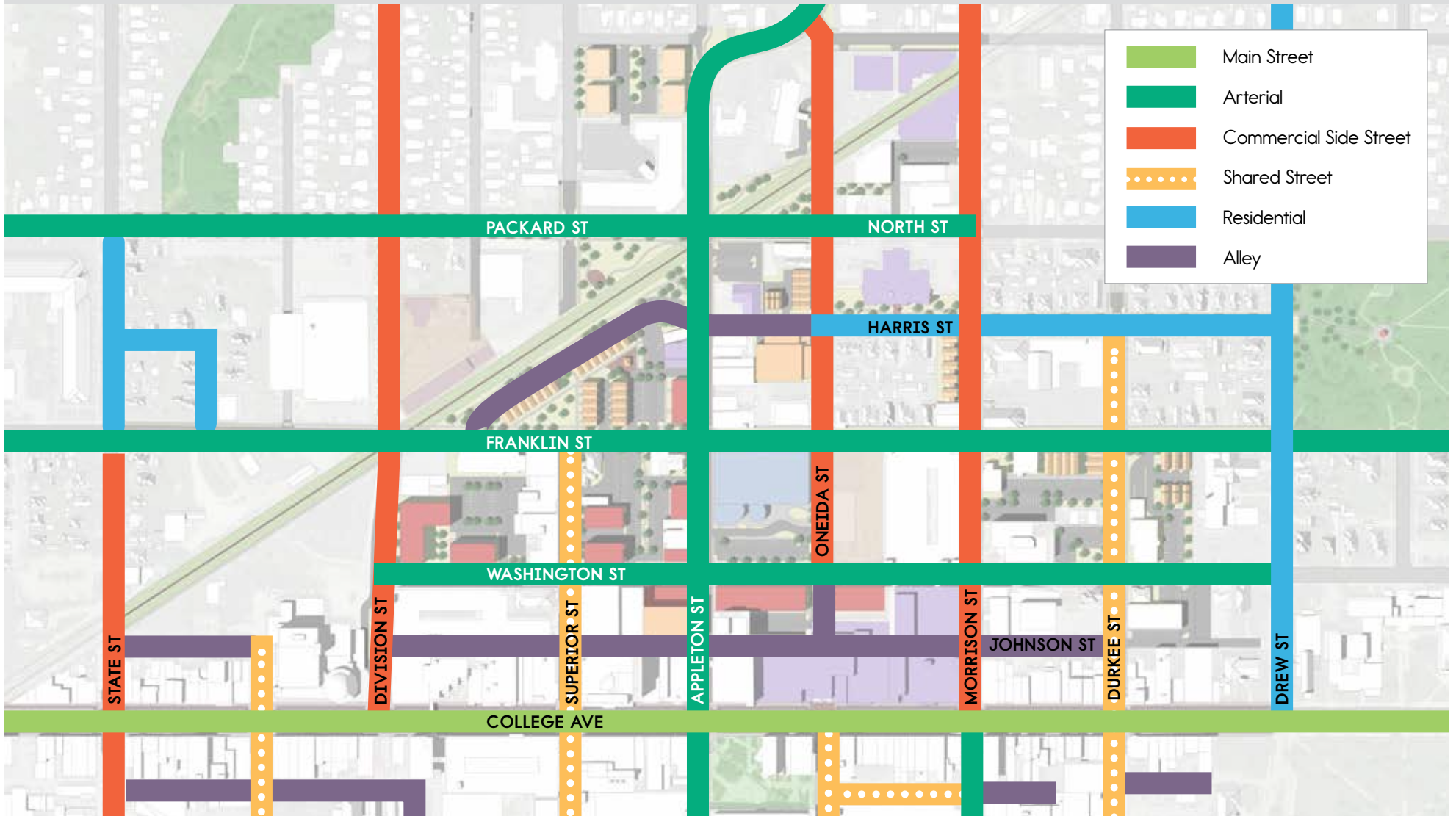
Implement the Downtown Streetscape Design Guide.

The design guide provides recommendations for each street typology in the neighborhood. Designs consider retrofits to roadways to provide multi-modal movements. Along with roadway improvements, this plan reinforces the recommended streetscape elements in that plan for public realm enhancements, including plantings, materials, street furniture, and lighting.

- This plan recommends amending the Streetscape Design Guide to include the extension of Harris Street to the west with an “alley” designation.
- This plan recommends applying streetscape design features through the interior of the City Center that align with Oneida Street.

The map on the next page is from the Downtown Streetscape Design Guide.

MAP 2.4: STREET TYPOLOGY



SOURCE: Downtown Streetscape Design Guide

ARTERIAL 60 FT ROW

4-Lane Arterial

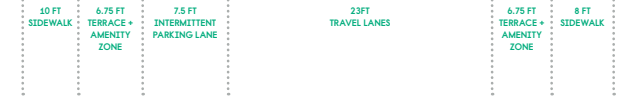


COMMERCIAL SIDE STREET 60 FT ROW

Parallel Parking



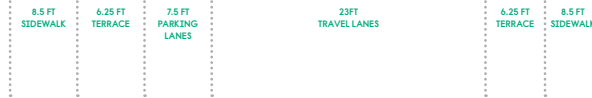
SHARED STREET 60 FT ROW



Bike and Pedestrian Boulevard



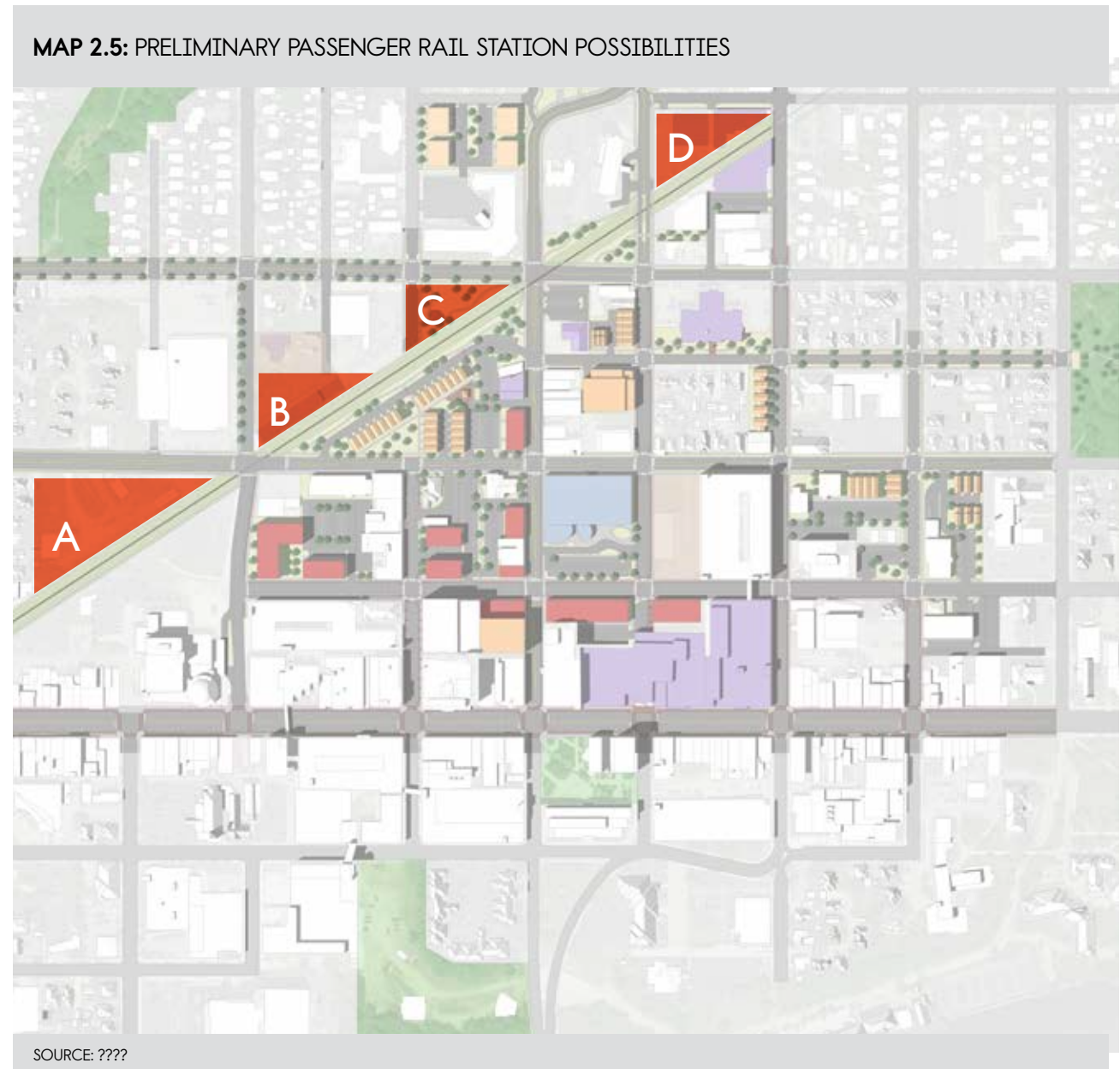
One-side Parking



Evaluate Passenger Rail Station

Amtrak and the Wisconsin Association of Railroad Passengers are exploring possibilities of introducing passenger rail between Milwaukee and Green Bay. This Plan identifies possible locations within the neighborhood for a railroad station, albeit that a much broader planning effort is necessary to determine the feasibility of passenger rail sites altogether. Possible sites for a passenger rail station include:

- A. **Franklin/Washington Triangle.** Site is close to a public parking structure, along a longer stretch of rail that is not interrupted by street crossings, and larger site.
- B. **Warehouse Building Site.** While a smaller site option, it is close to a parking structure and near compatible land uses.
- C. **Packard Park.** The proximity to the transit center and Appleton Street provides convenience to downtown services. Also, the site is at the crossroad of two collector streets - Packard and Appleton.
- D. **Automotive Block.** The site has a direct pathway to the transit center.



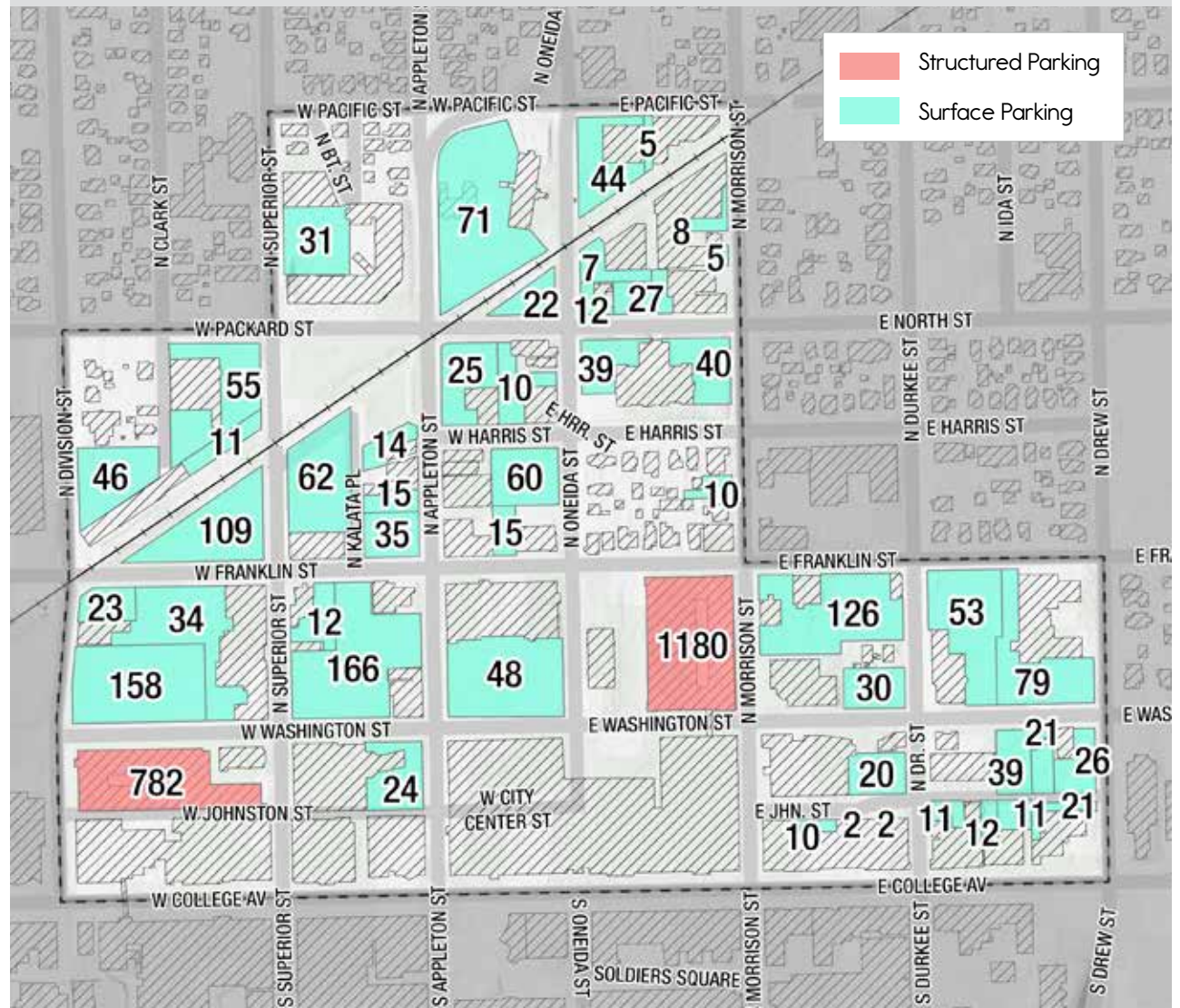
Monitor Parking Usage and Management

Parking in the neighborhood is provided by both the City and private property owners. The 2015 Parking Study indicated an over supply of parking. As a result, when the 400-stall Blue Ramp was demolished, it was not replaced. The site is now subject to private redevelopment that can better serve the neighborhood.

Downtown is experiencing an influx of new housing development, which will elevate parking demand in the neighborhood. Many of these new developments have parking. Once the projects become fully occupied, the City should conduct point-in-time counts twice a year to monitor parking demand and supply.

If parking supply becomes significantly competitive, this plan recommends to (1) adjust parking management, then (2) assist property owners in improving parking efficiency.

MAP 2.6: AVAILABLE PARKING



SOURCE: City of Appleton, RDG Planning & Design



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3

Project Priorities

PROJECT	PRIORITY	MILESTONE #1	RESPONSIBILITY
	PRIORITY, HIGH PRIORITY, HIGHEST		
1. Senior-Oriented Living	Priority	Private sector to initiate	Private
2. Existing Automotive Reuse	Priority	Private sector to initiate	Priority
3. Existing Building Reuse	Priority	Private sector to initiate	Private
4. AASD Maintenance Facility Reuse	Priority	Private sector to initiate	Private
5. Triangle Park	Priority	Initiate plan after housing built	Public
6. Townhomes (Harris St and Onieda St)	Priority	Project pending	Private
7. Multi-Family (Harris St and Onieda St)	Priority	Project pending	Private
8. Development Site (Onieda St and Franklin St)	Priority	Private sector to initiate	Private
9. Parking Lot	Priority	Initiate with Union Springs Development	Public
10. Building Rehabilitation	High Priority	Program for facade enhancements	Private
11. Mixed Use Project (Appleton St and Franklin St)	High Priority	Private sector to initiate	Private
12. Union Springs Development	Priority	Assemble property	Private/public
13. Union Springs Park	Priority	Require as part of developemnt plan	Private
14. Packard Place	Priority	Initiate plan after housing built	Public
15. Building Reuse or Redevelopment (Division St and railroad)	Priority	Private sector to initiate	Private

PROJECT	PRIORITY	MILESTONE #1	RESPONSIBILITY
	PRIORITY, HIGH PRIORITY, HIGHEST		
16. Human Services Campus	Priority	Private sector to initiate	Private
17. Multi-Family (Division St)	Priority	Private sector to initiate	Private
18. Development (Washington St and Division St)	Priority	Private sector to initiate	Private
19. Commercial Corner (Washington St and Superior St)	High Priority	Private sector to initiate	Private
20. Corner Redevelopment (Appleton and Washington)	High Priority	Private sector to initiate	Private
21. Appleton Public Library	Highest Priority	Complete project	Public
22. Public Transit Redevelopment	High Priority	Hire consultant	Public/Private Partnership
23. Morrison Street Infill	Priority	Private sector to initiate	Private
24. Durkee Street Infill	Priority	Private sector to initiate	Private
25. Franklin Street Infill	Priority	Private sector to initiate	Private
26. Merge Phase 1	High Priority	Project pending	Private
27. Merge Phase 2	High Priority	Project pending	Private
28. City Center Plaza	High Priority	Private sector to initiate	Private

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4

Market Study

Summary of Findings

Appleton faces challenges and opportunities similar to other consolidated metropolitan areas in the Midwest. However, there are also conditions unique to Appleton that inform future development potential. The following information provides an analysis of market trends in Appleton and the region to form recommendations for development.

The analysis represents a quantitative analysis separate from the more extensive public engagement campaign associated with the College Avenue North Plan. Conversations during the planning process provide context for several data points and identified focus areas.

STRENGTHS

- Steady population growth
- Located in a metropolitan area with strong jobs and potential for growth in many sectors.
- Construction, transportation, warehousing, and entertainment sectors are projected to grow in the region.
- Relatively strong incomes relative to other areas of the state, along with relatively lower housing prices compared to the state, may make Appleton a more affordable choice for some.
- Multi-family housing construction has historically been strong and proven successful in the market.
- A large stock of existing homes at price points that are affordable to many households. Although, there's limited movement out of these homes.
- Strong demand for new housing across many price points and unit types.

WEAKNESSES

- Unemployment rates in the region are below a healthy rate at about 1.6%. Extremely low unemployment means employers have challenges finding employees. The low rate can also indicate that more people have left the workforce either from retirement or no longer looking for work.
- Retail trade employment is projected to decrease through 2028. The decrease may be partially from automation, the pandemic pushing people out of jobs, more online shopping, and fewer workers wanting to take retail jobs. If reductions in employment results in retail closures, there could be an opportunity for these potential empty storefronts to transition to other unique needs for the community.
- Low vacancy rates and low housing inventory limit the movement of people to Appleton or the ability of people to choose housing that fits their needs.
- Relatively low single-family housing construction compared to the past versus local demand hinders people from moving out of existing older homes that would be more affordable to others.
- Appleton residents spend more retail dollars in other communities in store that do not require large footprints but could still be in mall type settings, like health, personal care, sporting goods, book, and music stores.

OPPORTUNITIES

- Appleton has a young population at a median age of 35.9 years old, 2.5 years younger than the metro. These are family-forming households that Appleton can retain as life-long residents if they have good experiences living in the city.
- Diversity is increasing in the city and downtown. Fostering unique businesses, arts, and culture welcomes more diversity and can create more reasons for people to visit downtown.
- From an employment perspective, the region has appeared to rebound well from the first waves of the COVID-19 pandemic. The rebound is promising for the resiliency of the economic region.
- Appleton businesses employ those who live in other cities, and the city attracts residents who work in other cities. Both are opportunities to fill employment needs and increase the population base if Appleton creates an attractive place to live and continues to invest and expand.
- As of the most recent data available, downtown residents tend to pay less in transportation and housing costs (most likely because of smaller units or renter options). However, the number of new units planned through 2023 will raise the median housing cost downtown.
- The statewide surge of business start-ups during the pandemic may eventually require small spaces to operate or expanded co-working spaces to get started.

- Restaurants and bars are much less affected by online shopping than other brick-and-mortar businesses. Small commercial districts rely on unique, local restaurants. With spending leakage of restaurants and other eating places in the primary market, downtown has an opportunity to attract these dollars. The primary market is defined as the Appleton-Oshkosh-Neenah Combined Statistical Area, excluding the City of Appleton.

THREATS

- Neighboring communities are growing more quickly than Appleton. The trend is partially related to strong growth in other cities that are less landlocked. However, this trend will change the economic position of Appleton over time.
- The uncertainties of the COVID-19 pandemic create instability for businesses owners and business growth, especially small businesses like those that might locate downtown.
- The increasing cost of housing and other expenses compared to manufacturing workers' wages and their ability to maintain a good quality of life in the region.
- The interstate system allows people to easily travel between cities to shop, work, and live. Therefore, there is more competition with other cities for regional spending and resident attraction.

Policies

TO SUPPORT/ADVANCE DATA INSIGHTS

- Continue to create a community that offers high quality of life and amenities that stand out from regional peers to attract regional workers to live in Appleton.
- Leverage downtown as a place that can be more affordable for young professionals or smaller households that can save transportation expenses or remote work.
- Closely consider whether public incentives are needed in the near-term for downtown development given the strong market and rent ranges.
- Consider the need to support existing retailers but do not rely on significant retail growth for niche areas like downtown.
- Spaces to support start-up businesses could be an opportunity to expand. These could be co-working labs, rent-free office space, or social groups that help provide resources that foster innovation.
- Focus on the dense mixed-use clusters like downtown as Appleton's unique image center – the part of the city that most powerfully attracts regional visitors seeking experiences.
- Leverage growth in ethnic and other unique, authentic restaurants and restaurant/entertainment rows.
- Ensure the municipal code and zoning ordinance are ready to permit future trends and changes such as mixed-uses, home occupations, parking/unit ratios, electric vehicle facilities, and delivery drop-offs.
- Develop opportunities that support smaller niche markets that do not require sizable building square footage. For example, policies should help capture more spending leaking to other cities at stores such as health, personal care, sporting goods, book, and music stores. These stores may also be more resilient to changing retail markets by offering classes, training, social groups, or other experiences.

These policy directions are based strictly on the quantitative data in the market analysis. The directions should be used in context with qualitative input and conversations associated with the College Avenue North Plan.

GOALS AND PURPOSE OF THE MARKET ANALYSIS

1. To inform plans for the College Avenue North neighborhood
2. To identify target markets
3. For general information and understanding of Appleton's strategic position
4. To make specific policy recommendations to grow Appleton

DATA SOURCES

Many data sources provide context about the Appleton market. Those in this analysis include:

- The U.S. Decennial Census and American Community Survey (2019 5-year Estimates unless noted otherwise)
- Multiple Listings Service (MLS) data
- Bureau of Labor Statistics
- Environmental Systems Research Institute (ESRI)

- Local city building permit data, provided by local staff
- Past plans, studies, and city data provided by local staff

AREA OF INTEREST

The market analysis focuses on data to inform recommendations for Downtown Appleton, which includes the subset area of the College Avenue North Plan.

Downtown does not operate in a vacuum. People visit and work downtown from other areas and help drive demand and supply of different uses. The conditions in the surrounding region can also present the feasibility of certain types of development downtown. Therefore, different areas of comparison in this analysis include:

- Downtown
- City of Appleton
- Appleton-Oshkosh-Neenah Combined Statistical Area
- State of Wisconsin

MARKET INDICATORS

The series of data topics on the following pages that define the Appleton market include:

- Macroeconomic Indicators – Trends at the state and national level that inform potential trends in the region
- The Appleton Market – The local market and how it performs in the region
- Housing Market Forecasts – Future population and demand for housing
- Downtown Market Potential – The retail environment and other implications for downtown

Macro Snapshot

Broad national economic trends provide a starting point for understanding current conditions and potential future trends. Many factors influence local conditions and planned investment while giving clues on consumer living and spending preferences.

EMPLOYMENT

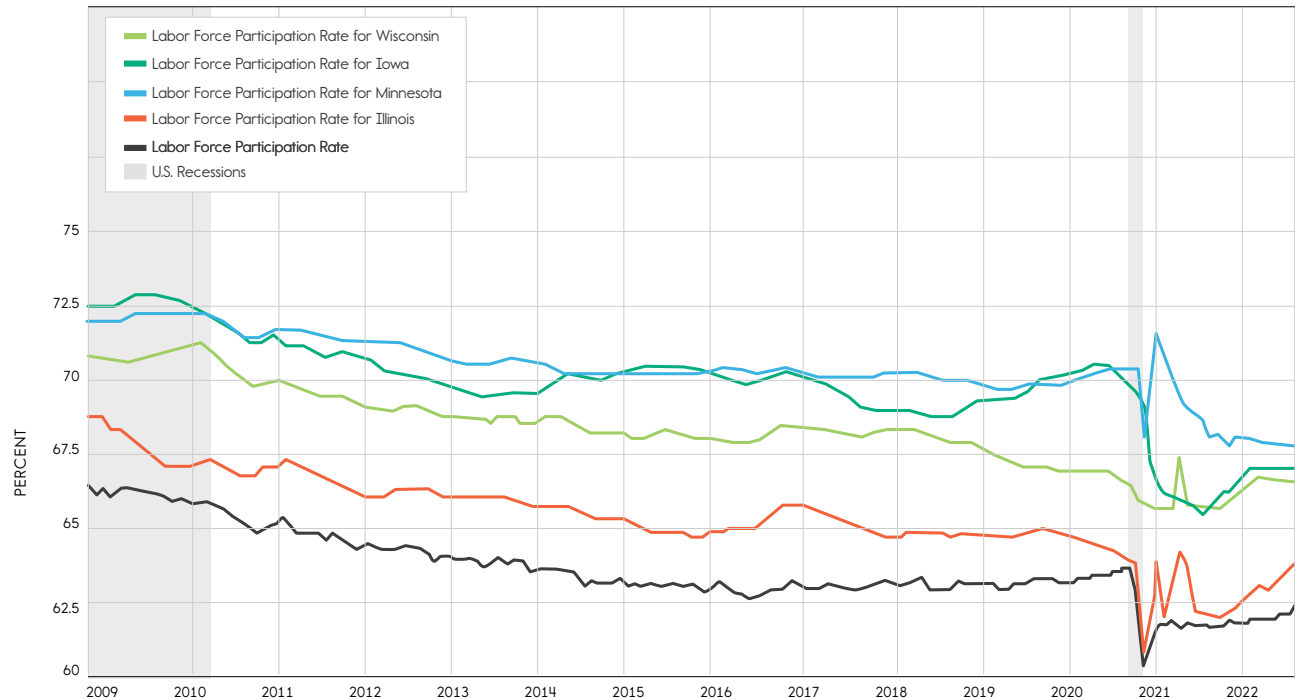
What the data means for Appleton:

- More workers are needed to fill job openings than in the past.
- As of 2021, a stable labor force participation rate not as widely impacted by the pandemic. People are generally employed if they want to be employed.
- Many used the pandemic as a reason to change jobs or leave the workforce.

Labor Market Shifts

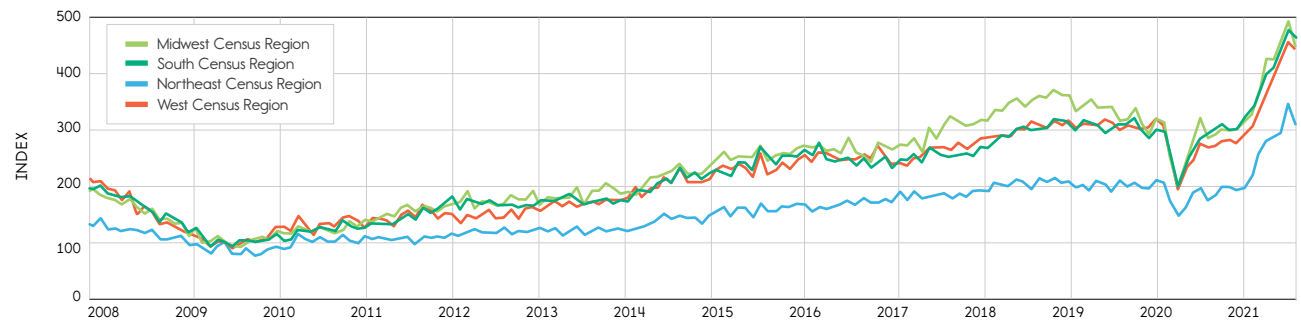
- The labor force participation rate shows a drop

FIGURE 1: LABOR FORCE PARTICIPATION RATE COMPARISON



Source: U.S. Bureau of Labor Statistics; U.S. Census, retrieved from FRED Federal Reserve Bank of St. Louis

FIGURE 2: TOTAL NON-FARM JOB OPENINGS – INDEX FROM JUNE 2009



Source: U.S. Bureau of Labor Statistics; U.S. Census, retrieved from FRED Federal Reserve Bank of St. Louis

in people actively looking for work after the 2020 recession. In Wisconsin, the decline was not as significant as in other states like Illinois and Iowa. The rate does not include those retiring and leaving the workforce.

- The Midwest had the highest increase in job openings from the end of the 2008 recession.

Remote Work

There is not yet extensive localized data on the transition rate to full-time remote work. However, national surveys indicate a potential trend toward more people working from home. For example:

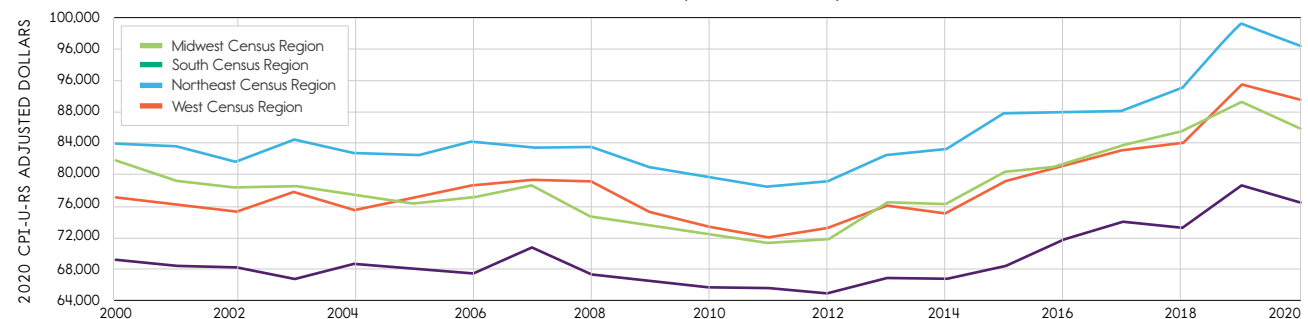
- Workers are averaging 5.8 remote workdays a month versus about 2.4 before the pandemic (Gallup, August 2020).
- Office businesses are most likely to implement remote work, and most expect to allow flexible remote work after the pandemic (NCCI, January 2021).
- People who remote work tend to have higher incomes and educational attainment, which may mean higher-paying industries may offer more remote work opportunities (U.S. Census).

INCOME AND EXPENSES

What the data means for Appleton:

- In Appleton, for the short term, car ownership will continue to be a necessity for most, regardless of income level.

FIGURE 3: REAL MEDIAN FAMILY INCOME CHANGE (BY REGION)



Source: U.S. Bureau of Labor Statistics; U.S. Census, retrieved from FRED Federal Reserve Bank of St. Louis

However, advancements in autonomous vehicle technology and its potential to influence public transit across more areas may shift this need in the long term.

- Young families may have higher burdens with the associated costs of children as a share of income.
- According to the most recent data, the decline in real income that began in 2020 has not rebounded. The lasting impacts of lower real income affect low-income households the most.
- Real incomes rose from 2008 to the 2020 pandemic, accounting for inflation. Incomes rose at a faster rate in the Northeast and West.
- Transportation, utility rates, childcare, and school debt add to the financial burden of a household. While a household may have adequate income, these costs affect how much people can spend on living expenses and discretionary spending like

shopping and services. Additionally, higher transportation costs may induce people to opt for remote work positions or live closer to where they work in person.

HOUSING

What the data means for Appleton:

- More money is needed to purchase a home and save for a downpayment. Thus, more people may prefer to rent or rent longer.
- Based on housing prices, the Midwest may seem more attractive, encouraging in-migration from individuals living in higher-priced and higher cost of living markets.
- Before construction supply chain issues in 2020/2021, buying a home may have become an option as incomes rose for some households.
- Fewer new housing options were built in the regional market than before 2008.

As a result, more people compete for the same units or move out of the region.

- Potentially fewer homeownership options at medium densities, such as townhomes and duplexes.
- If ownership units are not available, people that want to own may have to rent, leading to more competition for rental units, declining vacancy rates, and/or increased rents.
- Decreasing rental vacancy can reflect a lagging production of rental units and/or more people needing or wanting to rent because it takes time for the market to respond to demand. However, if there is a high rental vacancy rate, this does mean all vacant units are in livable condition.

Housing Prices

- After a decline during the 2008 recession, the median price of existing homes increased faster than ever before. The Midwest is no exception. While prices of existing homes in the Midwest are lower overall than in coastal cities, incomes are lower. The cost of new homes remained stable from 2017 to the beginning of 2020.

Construction

New housing construction patterns have emerged in the last few years:

- The Midwest and Northeast have lagged behind the West and South in new total new units since the 2008 recession.

FIGURE 4: MEDIAN EXISTING HOME PRICE (BY REGION)

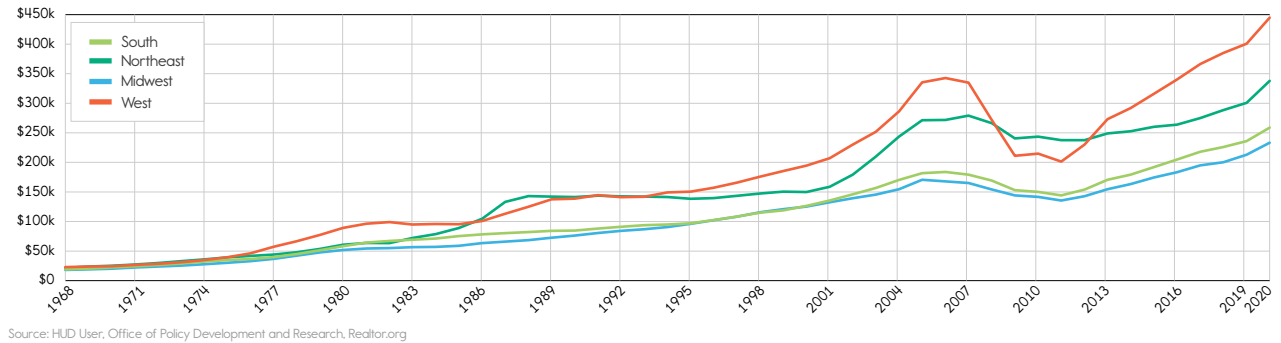


FIGURE 5: MEDIAN NEW HOME PRICE (BY REGION)

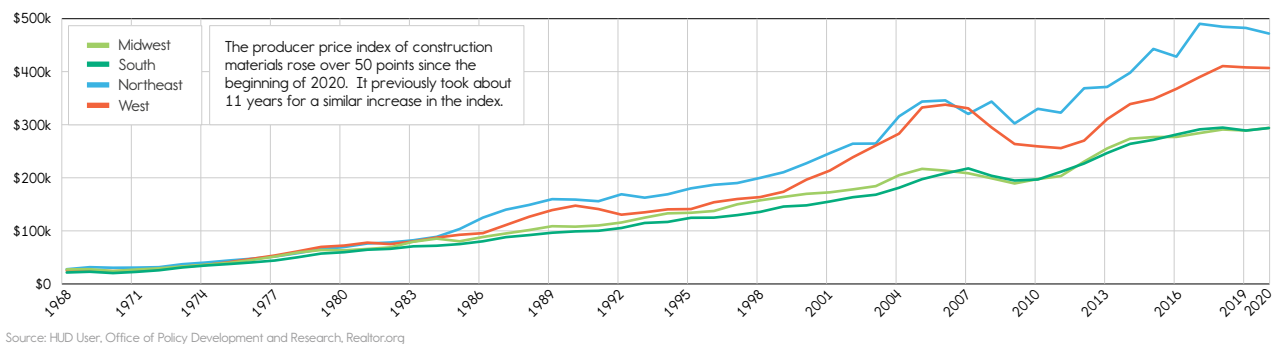


FIGURE 6: PRIVATE HOUSING UNITS COMPLETE (1,000S - BY REGION)

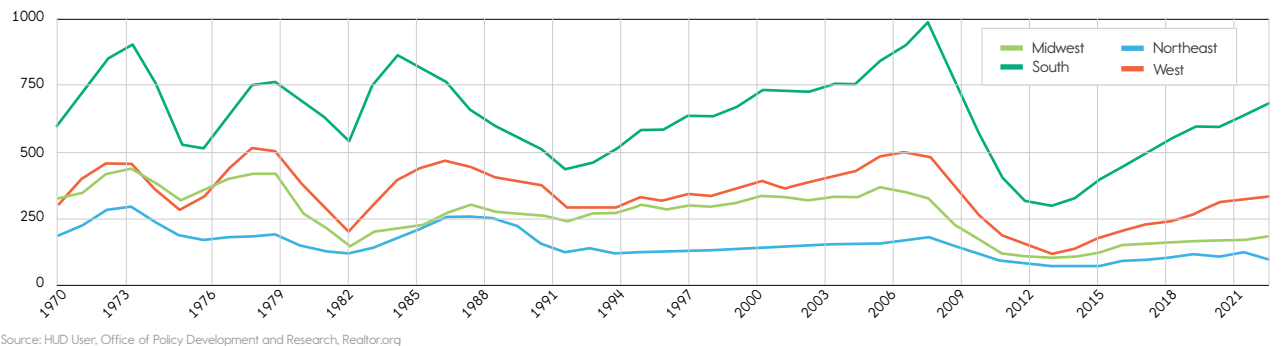
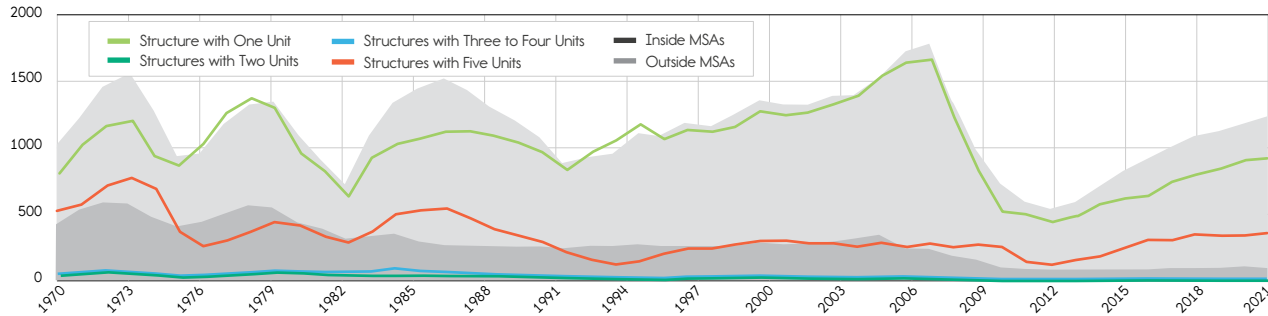
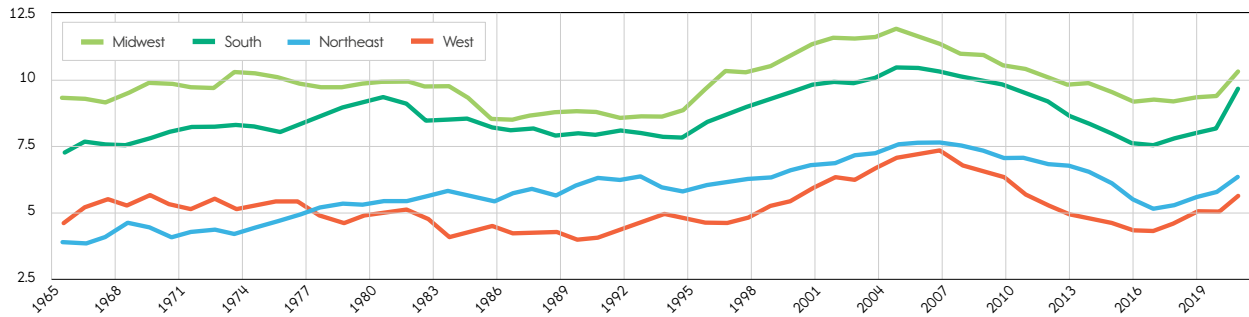


FIGURE 7: PRIVATE HOUSING UNITS COMPLETE (1,000S - BY STRUCTURE & METRO STATISTICAL AREA)



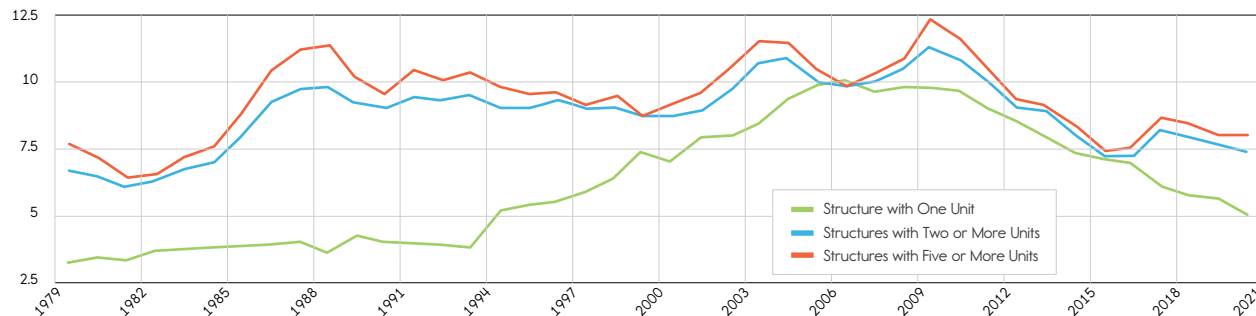
Source: HUD User, https://www.huduser.gov/portal/ushmc/hs_source.html; U.S. Census Bureau

FIGURE 9: ANNUAL HOMEOWNERSHIP RATE (BY REGION)



Source: HUD User, https://www.huduser.gov/portal/ushmc/hs_source.html; U.S. Census Bureau

FIGURE 10: ANNUAL RENTAL VACANCY RATE (BY STRUCTURE)



Source: HUD User, https://www.huduser.gov/portal/ushmc/hs_source.html; U.S. Census Bureau

- Much of this construction activity is single-family and multi-family structures with five units and fewer medium density options such as attached housing, townhomes, small-scale apartments, and multi-plexes.
- Development in Metropolitan Statistical Areas (MSAs) like Appleton, Oshkosh-Neenah, Madison, and Milwaukee has been stronger than in more rural and non-MSA areas.

Occupancy

Homeownership is not always the goal or appropriate for every household. However, steady or increasing homeownership rates can indicate a stable or more affordable market, or increases in local incomes. The Midwest has the highest homeownership rate in the country.

- The rental vacancy rate (and total vacancies) is declining, especially for single-unit homes. However, a higher rental vacancy for structures with more units is not uncommon as turnover is more elevated and needed to offer options in a local market.
- Note, homeownership rates declined in all regions from the second quarter of 2020 to the second quarter of 2021. However, data gathered under COVID-19 restrictions may be unrepresentative.

Appleton Market

Many factors will influence planning decisions and strategies for Appleton. This section presents many factors related to Appleton’s past trends and future forecasts.

POPULATIONS

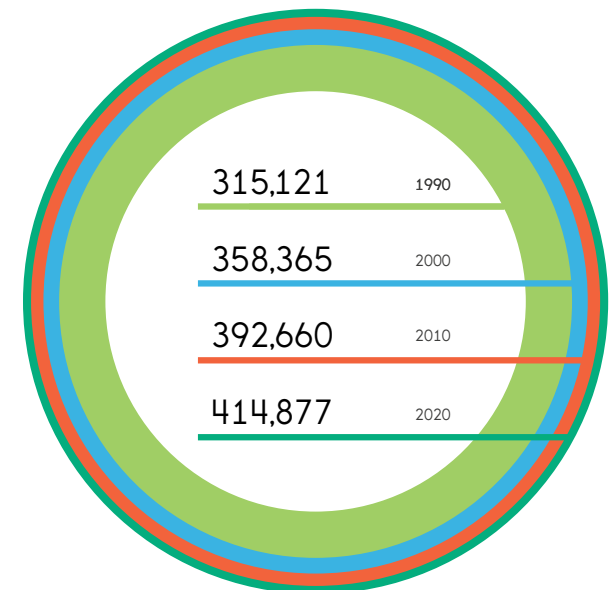
What: A look at recent population demographics and trends. Population demographics give clues to growth trends and the demand for various commercial and residential uses in the future. For example, a person’s age generally aligns with three cohorts with particular housing and retail demands.

What the data means for Appleton:

- Appleton is growing. Increases in population increase potential local commercial spending and pressure on new housing development.
- Population in the MSA is growing at a faster pace than Appleton - Outagamie, Winnebago, and Calumet Counties. The growth outside of Appleton could be from a lack of housing options in Appleton or households’ preference to live in other areas. This is not necessarily a bad thing as Appleton does provide employment and housing options for the larger region and vice versa. However, it does indicate that people and/or developers are gravitating toward other jurisdictions or rural areas.

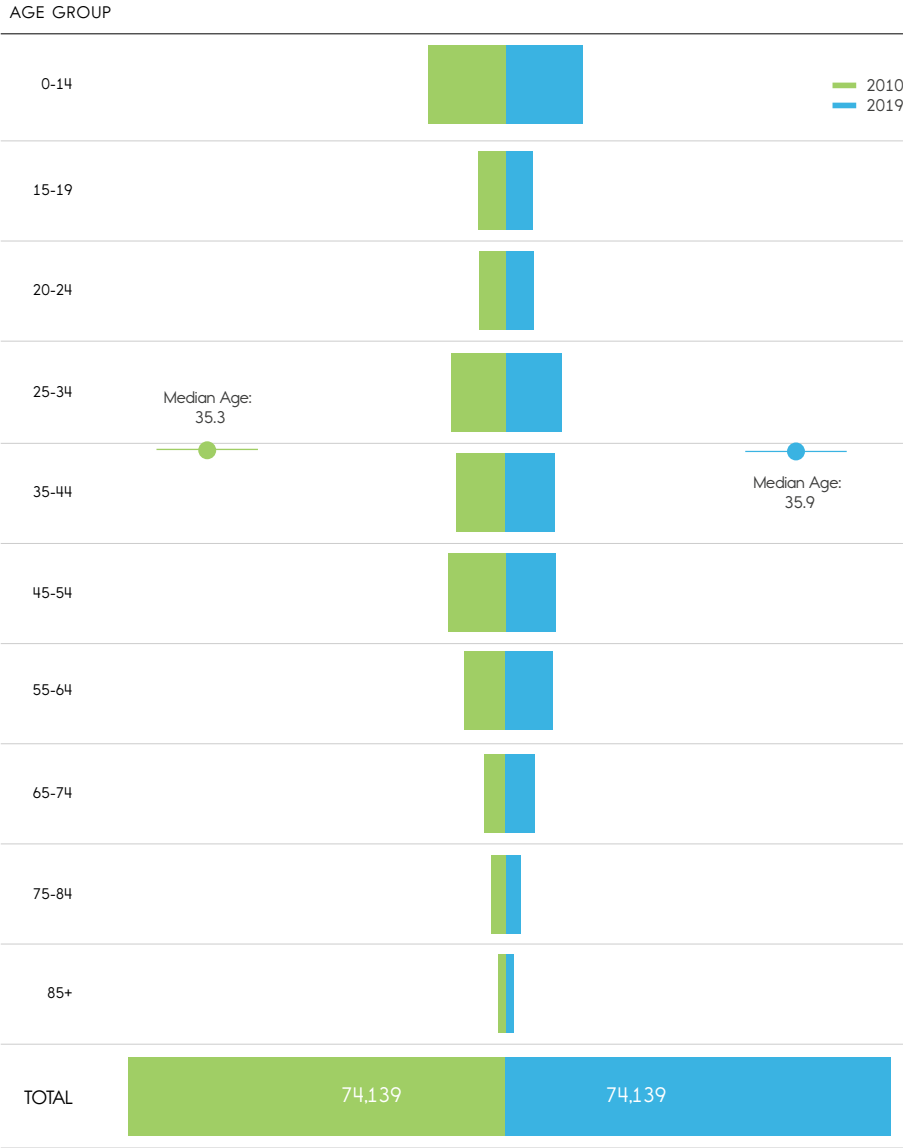
- Appleton’s population is about 2.5 years younger than the region, influenced slightly by college-aged people. However, the city and region also appear attractive to family forming age cohorts between 25 and 34. This can mean the area is attractive for families either because of employment opportunities, housing options, or other quality of life features.
- Appleton’s demographic diversity is increasing more than in the region. Additionally, downtown is more diverse than the rest of the city. The population is expected to continue becoming more diverse.

FIGURE 11: HISTORICAL POPULATION CHANGE FOR MSA



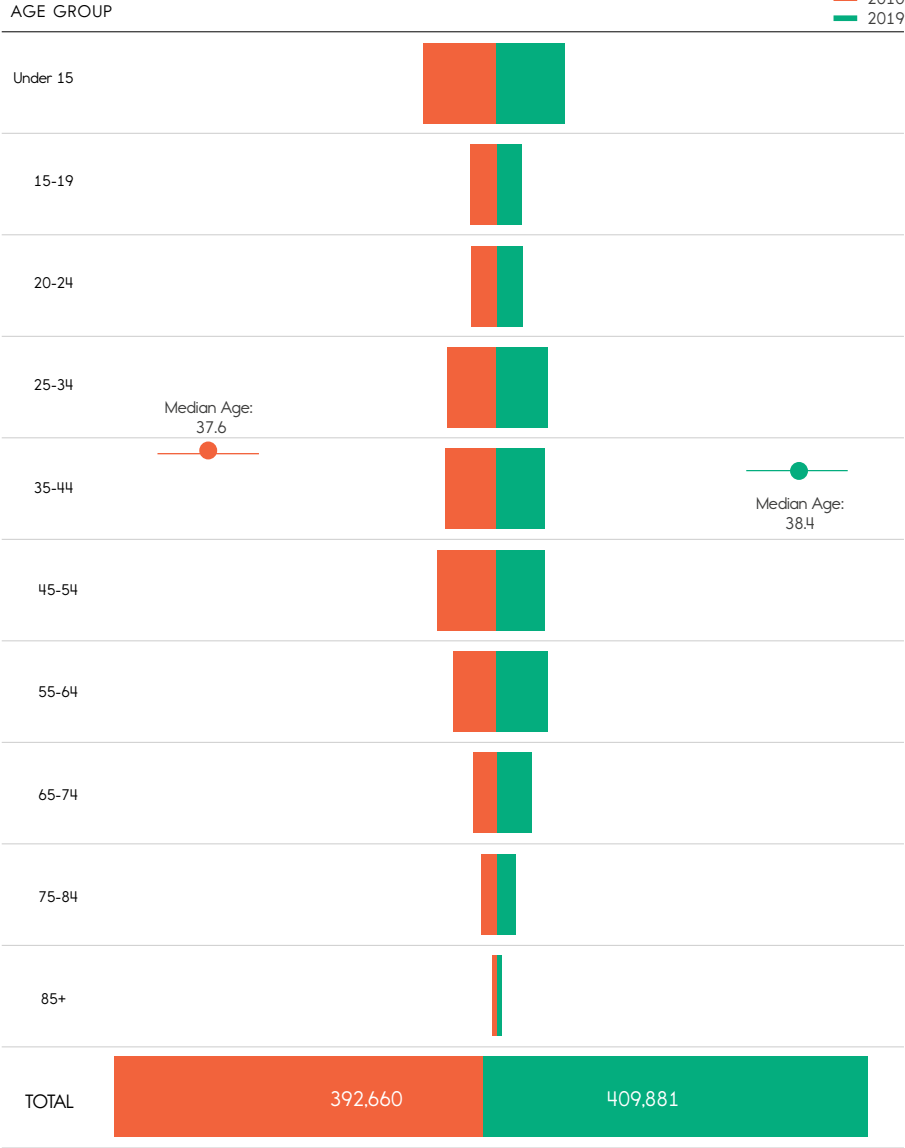
Source: U.S. Census

FIGURE 12: APPLETON, WI POPULATION CHANGE



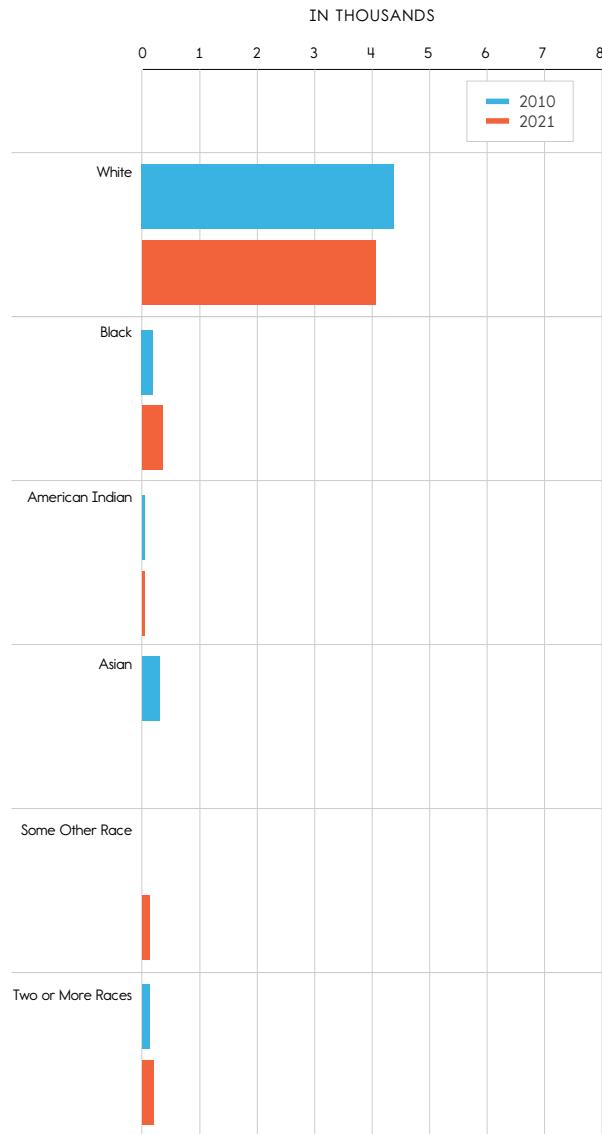
Source: U.S. Census; American Community Survey

FIGURE 13: APPLETON-OSHKOSH-NEENAH, WI, CSA POPULATION CHANGE



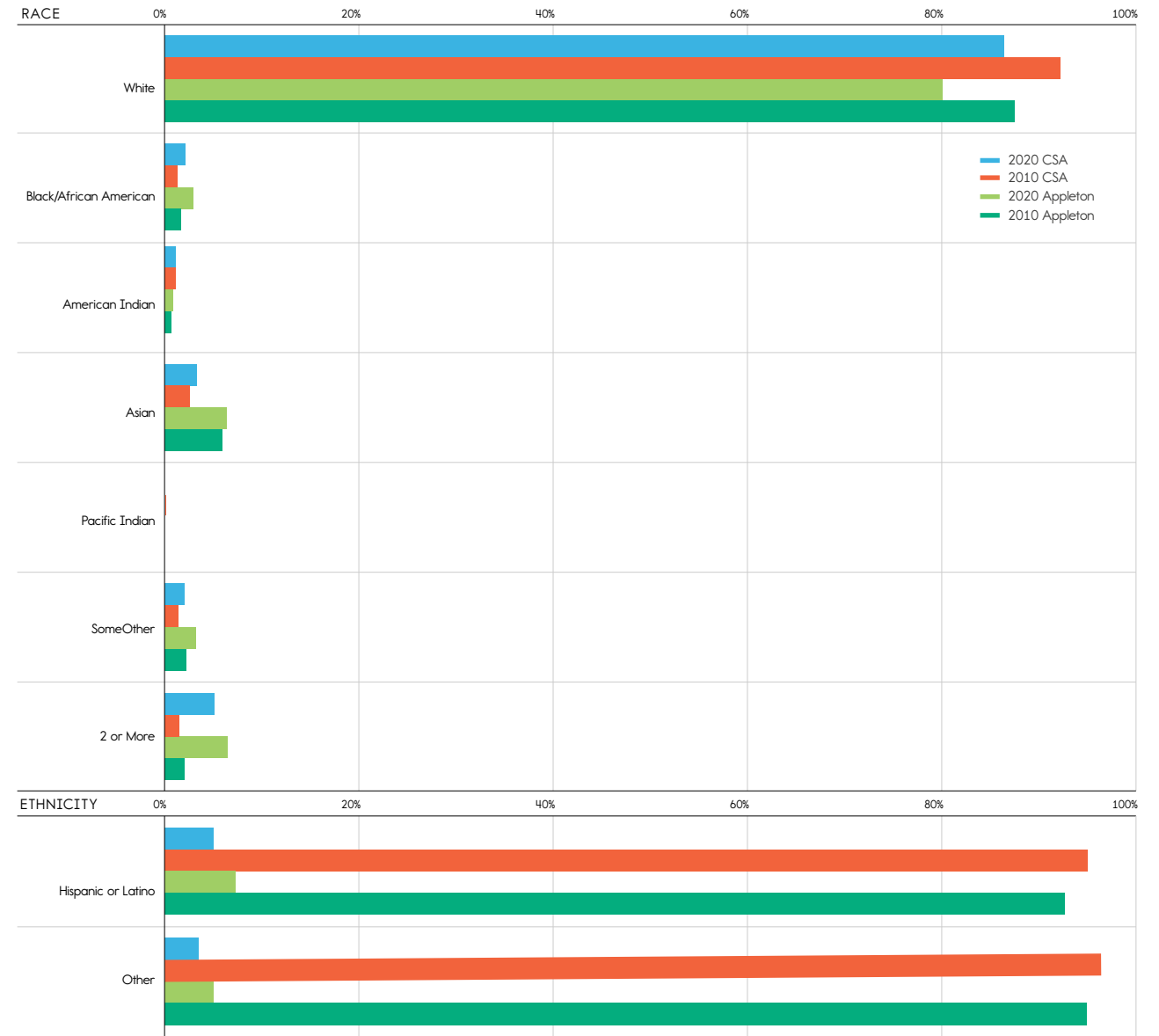
Source: U.S. Census; American Community Survey

FIGURE 14: RACIAL MAKEUP OF DOWNTOWN APPLETON



Source: ESRI

FIGURE 15: RACE AND ETHNICITY COMPARISON



Source: U.S. Census

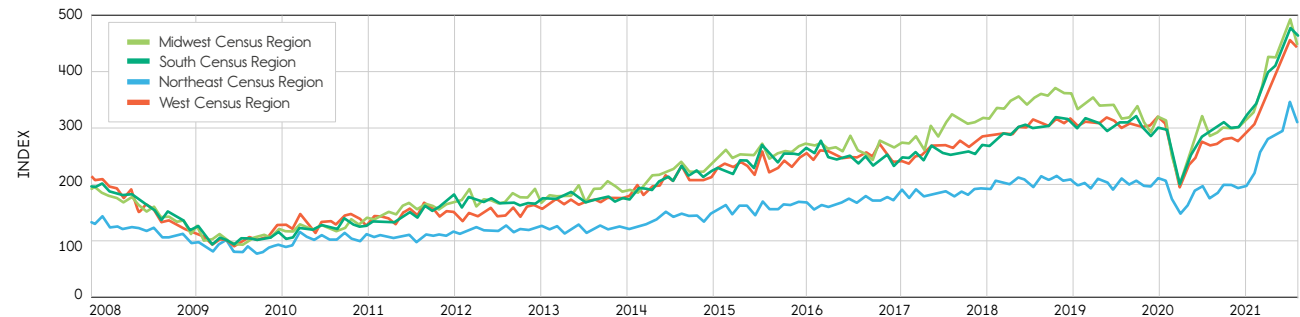
EMPLOYMENT AND JOBS

What: Where residents of Appleton work and the employment characteristics of jobs in Appleton. Employment provides insight into regional strengths that could attract employees or lead to further business cluster development – both factors can lead to population and land development growth in high-demand areas.

Employment characteristics in Appleton affect potential markets for Appleton growth. For example:

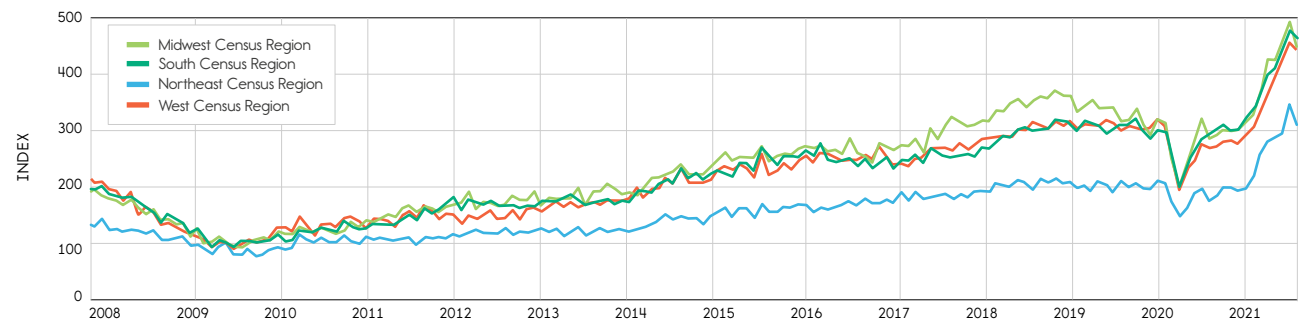
- People who live and work in Appleton spend nearly all their time in Appleton.
- People who live in Appleton but work outside of the city likely divert at least some shopping for goods and services in areas around where they work – A missed opportunity.
- People who live outside of Appleton but hold jobs in the city or the immediate vicinity raise the possibility to retain some of their spending during their commute to work.

FIGURE 16: TOTAL NONFARM EMPLOYMENT ANNUAL PERCENT CHANGE IN THE REGION, 2012-2021



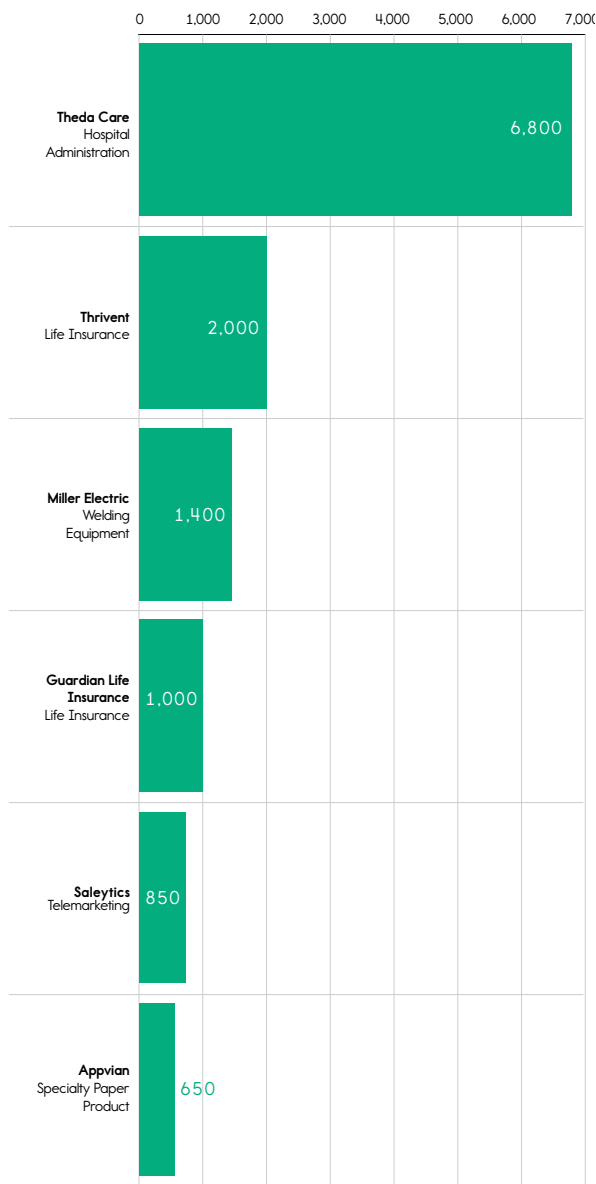
Source: U.S. Bureau of Labor Statistics; U.S. Census, retrieved from FRED Federal Reserve Bank of St. Louis

FIGURE 17: SEASONALLY ADJUSTED BUSINESS APPLICATIONS IN WISCONSIN, 2017-2021



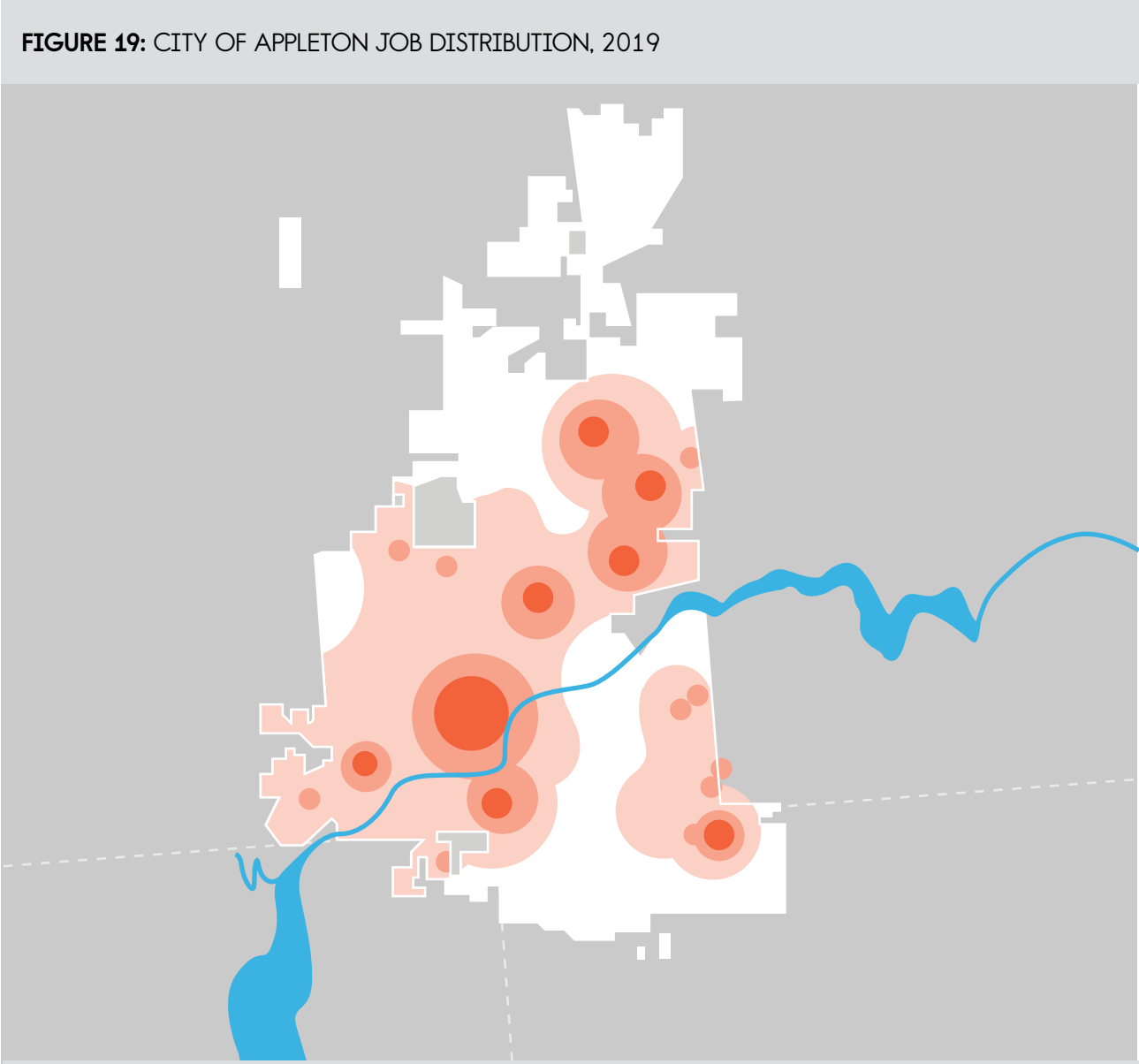
Source: U.S. Bureau of Labor Statistics; U.S. Census, retrieved from FRED Federal Reserve Bank of St. Louis

FIGURE 18: LARGEST EMPLOYERS IN APPLETON
CURRENT EMPLOYEES



Source: Fox Cities Regional Planning

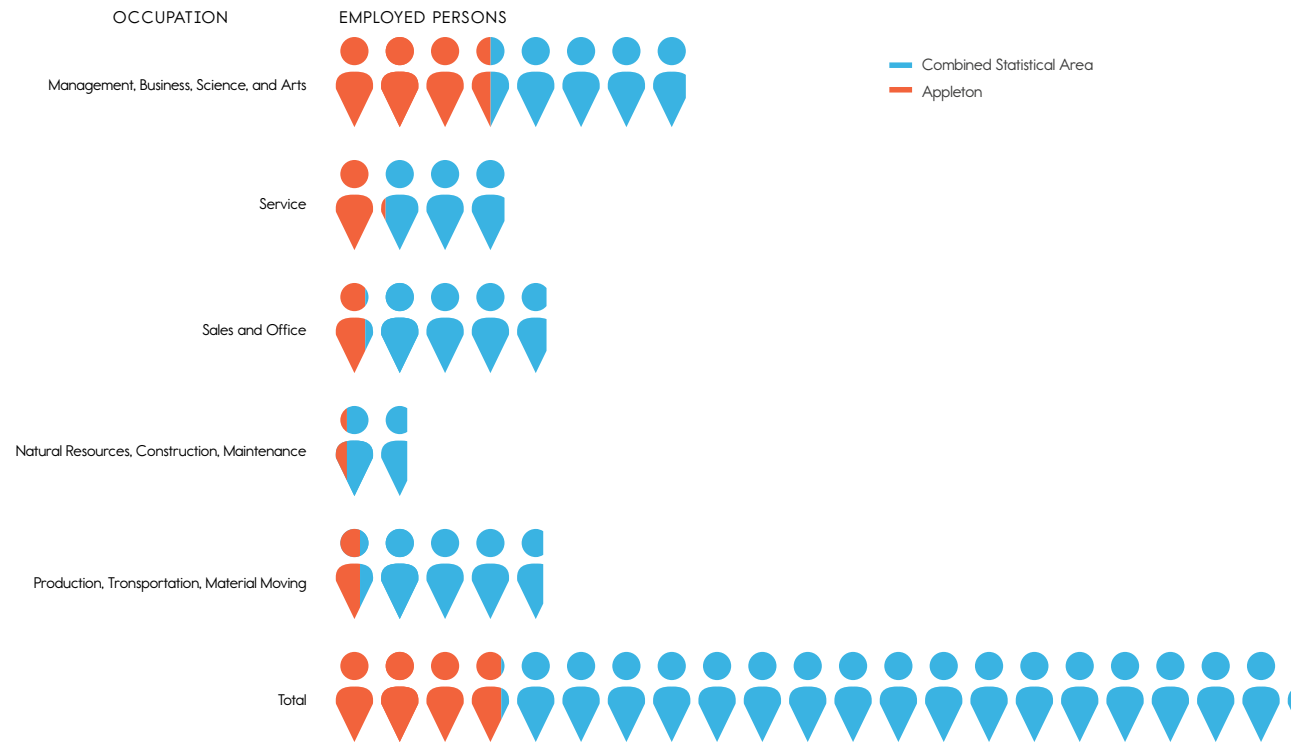
FIGURE 19: CITY OF APPLETON JOB DISTRIBUTION, 2019



Source: U.S. Census Bureau, Center for Economic Studies, LEHD Census on the Map

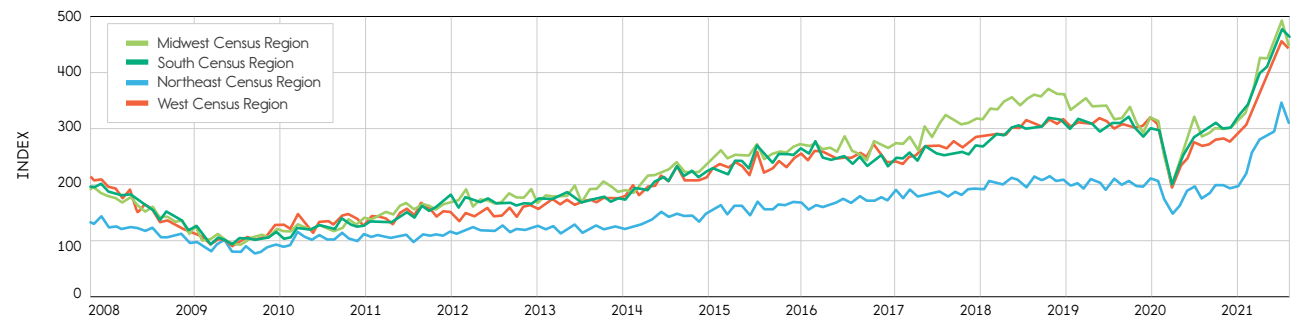
- Appleton is part of a larger employment and job market that generally performs better than the state on several metrics. Employment growth will continue, increasing the need for employees to either live in the region or travel to the region for work.
- Like much of the country, Appleton was affected by the COVID-19 pandemic. As a result, employment fell and unemployment increased in 2020. However, Appleton and the region have rebounded relatively quickly, with most, if not more, of the losses in 2020 recouped in 2021. The unemployment rate is the lowest its been for the past ten years (this may be partially attributed to more people no longer looking for work for various reasons, who do not get counted as unemployed).

FIGURE 21: EMPLOYED POPULATION BY OCCUPATION



Source: American Community Survey (2016-2022 Estimates)

FIGURE 21: UNEMPLOYMENT RATE, 2011-2021

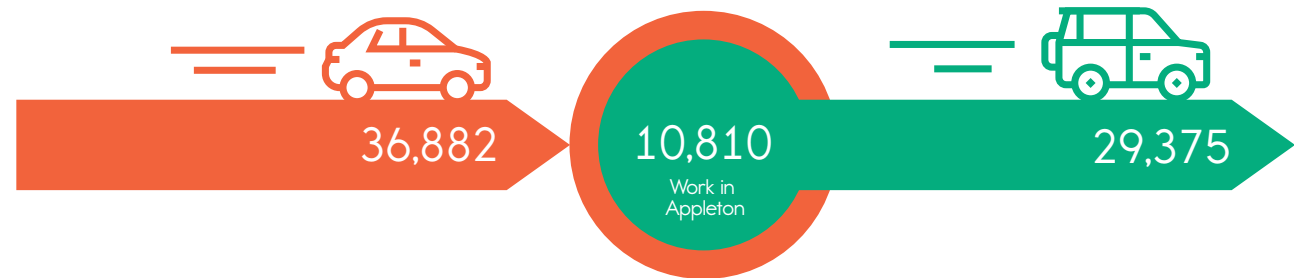


Source: U.S. Bureau of Labor Statistics; U.S. Census, retrieved from FRED Fecera Reserve Bank of St. Louis

COMMUTING PATTERNS

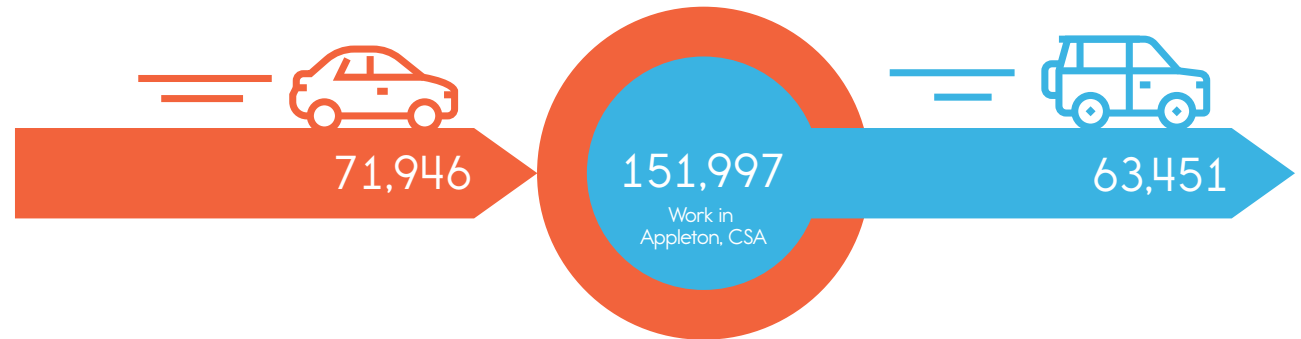
- People travel from across the region to work in Appleton. About 23% of people working in Appleton also live in Appleton. Appleton imports a large majority of workers from other areas. This is not uncommon in consolidated metro areas like the Fox Cities. However, this is still an opportunity to capture population growth if workers can choose to live in Appleton.
 - Conversely, many employed people living in Appleton work in other areas. Many travel to work in nearby cities like Neenah, Oshkosh, and Fox Crossing. This level of cross-commuting is fairly typical for cities within a larger metro.
- The status of remote work is still uncertain. Localized data is not available, but anecdotal evidence from national trends in the previous section and qualitative surveys indicates potential permanent transitions to remote work for office and professional-type jobs.

FIGURE 22: DAILY INFLOW/OUTFLOW OF WORKERS TO APPLETON, 2019



Source: U.S. Census Bureau, Center for Economic Studies, LEHD Census on the Map

FIGURE 23: DAILY INFLOW/OUTFLOW OF WORKERS TO APPLETON CSA, 2019



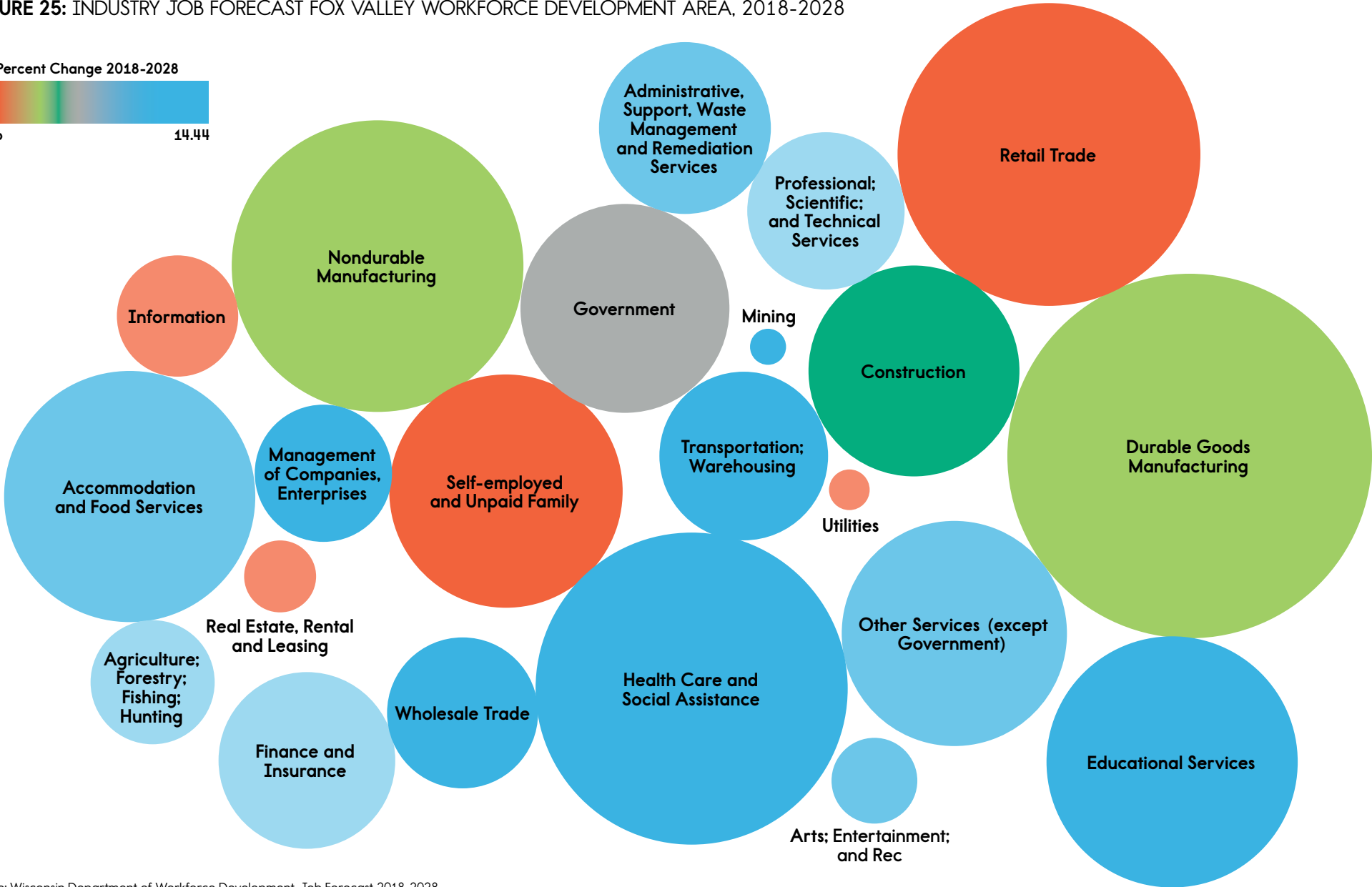
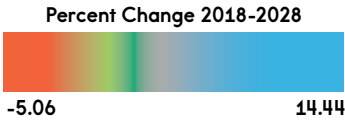
Source: U.S. Census Bureau, Center for Economic Studies, LEHD Census on the Map

FIGURE 24: JOB COUNTS BY PLACES APPLETON WORKERS LIVE AND APPLETON RESIDENTS WORK, 2019

WHERE PEOPLE WHO WORK IN APPLETON LIVE			WHERE PEOPLE WHO LIVE IN APPLETON WORK		
	COUNT	SHARE		COUNT	SHARE
All Places (Cities, CDPs, etc.)	47,692	100.0%	All Places (Cities, CDPs, etc.)	40,185	100.0%
Appleton city, WI	10,810	22.7%	Appleton city, WI	10,810	26.9%
Neenah city, WI	1,897	4.0%	Neenah city, WI	2,532	6.3%
Menasha city, WI	1,810	3.8%	Fox Crossing village, WI	2,046	5.1%
Fox Crossing village, WI	1,638	3.4%	Oshkosh city, WI	1,767	4.4%
Kaukauna city, WI	1,624	3.4%	Menasha city, WI	1,440	3.6%
Harrison village, WI	1,587	3.3%	Green Bay city, WI	1,300	3.2%
Oshkosh city, WI	1,529	3.2%	Little Chute village, WI	976	2.4%
Little Chute village, WI	1,113	2.3%	Kaukauna city, WI	882	2.2%
Kimberly village, WI	840	1.8%	Ashwaubenon village, WI	863	2.1%
Green Bay city, WI	713	1.5%	Milwaukee city, WI	603	1.5%
All Other Locations	24,131	50.6%	All Other Locations	16,966	42.2%

Source: U.S. Census Bureau, Center for Economic Studies, LEHD Census On the Map

FIGURE 25: INDUSTRY JOB FORECAST FOX VALLEY WORKFORCE DEVELOPMENT AREA, 2018-2028



Source: Wisconsin Department of Workforce Development, Job Forecast 2018-2028

FIGURE 26: INDUSTRY JOB FORECAST FOX VALLEY WORKFORCE DEVELOPMENT AREA, 2018-2028

INDUSTRY TITLE	ESTIMATED BASE YEAR EMPLOYMENT	PROJECTED ESTIMATED EMPLOYMENT	PROJECTED CHANGE
Self Employed and Unpaid Family Workers; All Jobs	11,744	11,298	-3.80%
Agriculture; Forestry; Fishing and Hunting	3,782	3,907	3.31%
Mining	415	456	9.88%
Utilities	276	266	-3.62%
Construction	9,658	11,053	14.44%
Durable Goods Manufacturing	28,956	28,785	-0.59%
Nondurable Manufacturing	18,929	18,827	-0.54%
Wholesale Trade	5,818	6,424	10.42%
Retail Trade	19,561	18,571	-5.06%
Transportation and Warehousing	6,951	7,588	9.16%
Information	3,135	2,995	-4.47%
Finance and Insurance	6,631	6,727	1.45%
Real Estate, Rental and Leasing	1,197	1,169	-2.34%
Professional; Scientific; and Technical Services	5,285	5,387	1.93%
Management of Companies and Enterprises	4,710	5,260	11.68%
Administrative, Support, Waste Management and Remediation Services	6,539	6,924	5.89%
Educational Services	15,315	16,315	6.53%
Health Care and Social Assistance	23,669	25,458	7.56%
Arts; Entertainment; and Recreation	1,808	1,940	7.30%
Accommodation and Food Services	14,687	15,485	5.43%
Other Services (except Government)	12,026	12,504	3.97%
Government	10,796	10,794	-0.02%

Source: Wisconsin Department of Workforce Development, Job Forecast 2018-2028

INCOME, WAGES, AND COST OF LIVING

What: Income and earning characteristics of Appleton households and the region. Income indicates how much disposable income people may have to spend on local businesses and housing. If housing options are limited, households may seek to live and work in other communities in the region or live in options that do not fit their needs.

What the data means for Appleton:

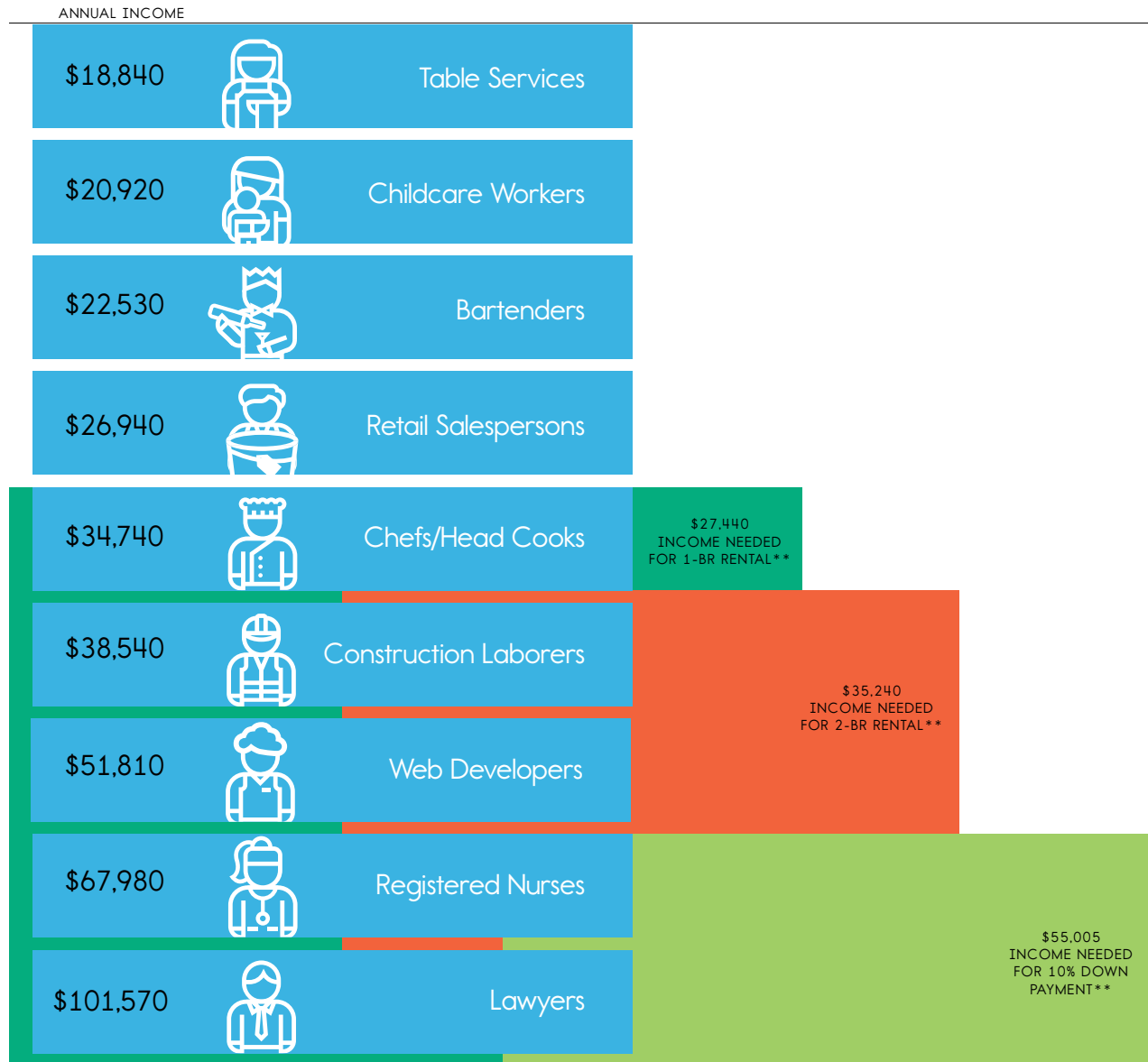
- Median household incomes in Appleton reflect more of its manufacturing base. While below the median income in the region, Appleton’s household incomes are relatively similar to those in the state. Appleton has a higher percentage of households making between \$35,000 to \$75,000 annually. Affordability of housing and other expenses is essential for these households.

FIGURE 27: INCOME DISTRIBUTION, 2020



Source: American Community Survey (2016-2020 Estimates)

FIGURE 28: LIVABLE WAGES, 2021



*2021 Median Home Price: \$221,966 **2021 Fair Market Rent: Studio \$643/month, 1br \$686/month, 2br \$881/month, 3br \$1,190/month, 4br \$1,195/month
 Source: Based on salary data from the Paycheck to Paycheck Database for the Appleton Metropolitan Statistical Area

- Workers needed to grow entertainment and service businesses in Appleton face challenges affording to live in the metro. Growing businesses like bars, restaurants, retail shopping, and services downtown will hinge on attracting the people to work these jobs, having an affordable place to live, and/or providing adequate wages.
- Homeowners in Appleton pay less than those in the region and state. However, renters pay a little more than the region, likely related to the influx of new, higher-priced multi-family developments in the past ten years.
- Downtown residents pay less overall for housing and transportation costs than those living in the rest of the city and region.

HOUSING DEMAND AND SUPPLY

What: Many indicators help inform the state of the housing market and potential future trends. Several are summarized below and used in the context of the broader market analysis to forecast housing needs in the future. The characteristics and trends in land use indicate growing demand or weakening of specific markets based on the changes in supply over time and compared to other parts of the region.

What the data means for Appleton:

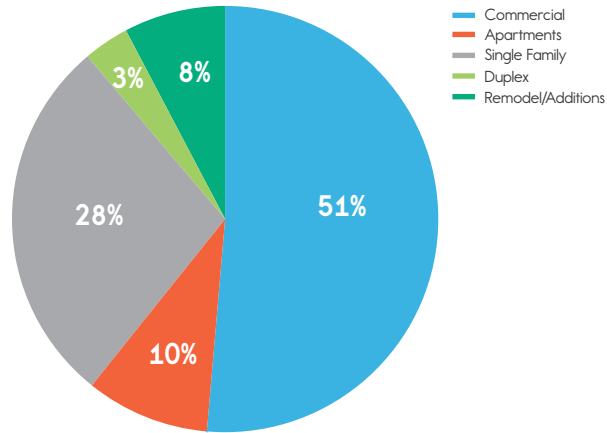
- Falling citywide vacancy rates from 2010 to 2020 means more competition for units and high sales prices. The 2020 vacancy rate of 4.4% is below the ideal healthy rate of 5%-6%.
- Median people per household have decreased since 2010 in both owner and renter households. This aligns with national trends related to an aging population.
- Large numbers of multi-family units built from 2011 to 2015 have been absorbed in the market, while single-family construction has started to uptick since 2018. As a result, the lower construction numbers since 2016 are reflected in the lower reported 2020 vacancy rate.
 - Since 2008 most cities have seen more rental units converted or added to the market than owner-occupied units. This is for several reasons, including more

FIGURE 29-30: RENT AND HOME OWNERSHIP COSTS, 2020

GROSS RENT COST	APPLETON		CSA		WISCONSIN	
Less than \$500	950	9.6%	4,478	9.3%	71,621	9.5%
\$500 to \$999	6,307	63.7%	32,272	67.3%	419,841	56.0%
\$1,000 to \$1,499	2,255	22.8%	9,686	20.2%	199,106	26.5%
\$1,500 to \$1,999	270	2.7%	939	2.0%	42,480	5.7%
\$2,000 to \$2,499	61	0.6%	236	0.5%	9,723	1.3%
\$2,500 to \$2,999	60	0.6%	109	0.2%	3,263	0.4%
\$3,000 or more	0	-	264	0.6%	4,338	0.6%
Median (dollars)	\$796		801		872	
No rent paid	270		1,575		31,063	
HOME OWNERSHIP MONTHLY COST	APPLETON		CSA		WISCONSIN	
Less than \$500	69	0.5%	539	0.7%	8,224	0.8%
\$500 to \$999	2,760	21.0%	14,339	19.2%	187,600	18.5%
\$1,000 to \$1,499	6,492	49.5%	32,251	43.3%	355,283	35.1%
\$1,500 to \$1,999	2,054	15.7%	16,594	22.3%	244,455	24.2%
\$2,000 to \$2,499	902	6.9%	6,196	8.3%	114,448	11.3%
\$2,500 to \$2,999	493	3.8%	2,412	3.2%	49,894	4.9%
\$3,000 or more	349	2.7%	2,173	2.9%	51,446	5.1%
Median (dollars)	\$1,256		\$1,339		1,436	
Housing units with a mortgage	13,119		74,504		1,011,350	

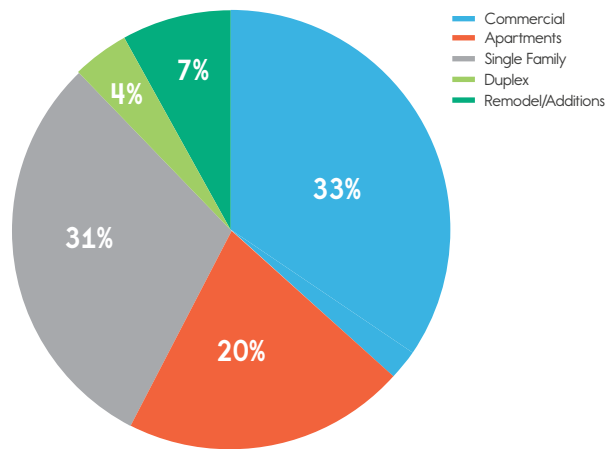
Source: American Community Survey (2016-2020 Estimates)

FIGURE 31: FOX CITIES TOTAL CONSTRUCTION ACTIVITY BY PERMIT VALUE, 2020



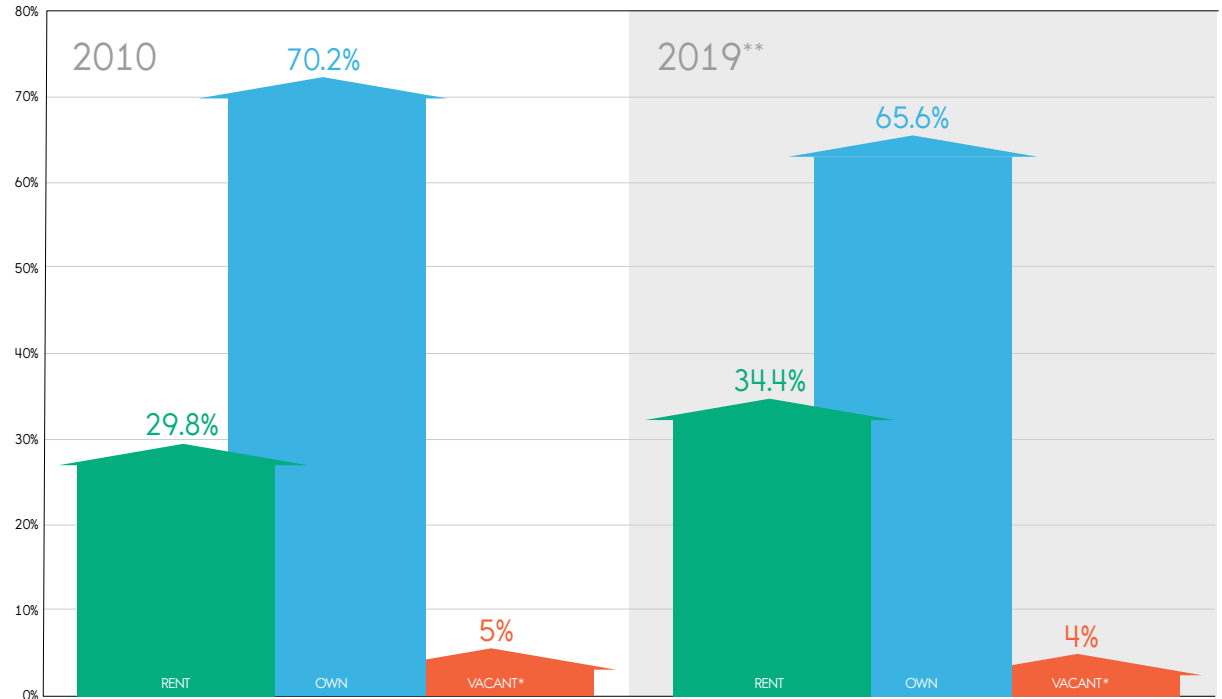
Source: City of Appleton

FIGURE 32: CITY OF APPLETON TOTAL CONSTRUCTION ACTIVITY BY PERMIT VALUE, 2020



Source: City of Appleton

FIGURE 33: CITY OF APPLETON RESIDENTIAL OCCUPANCY AND VACANCY, 2010-2019



*The 2020 Census reported vacancy rate was 4.4%. **The owner/renter split downtown is estimated at 47%/53%.
Source: U.S. Census; American Community Survey, ESRI.

FIGURE 34: CITY OF APPLETON RESIDENTIAL CONSTRUCTION ACTIVITY, 2012-2021

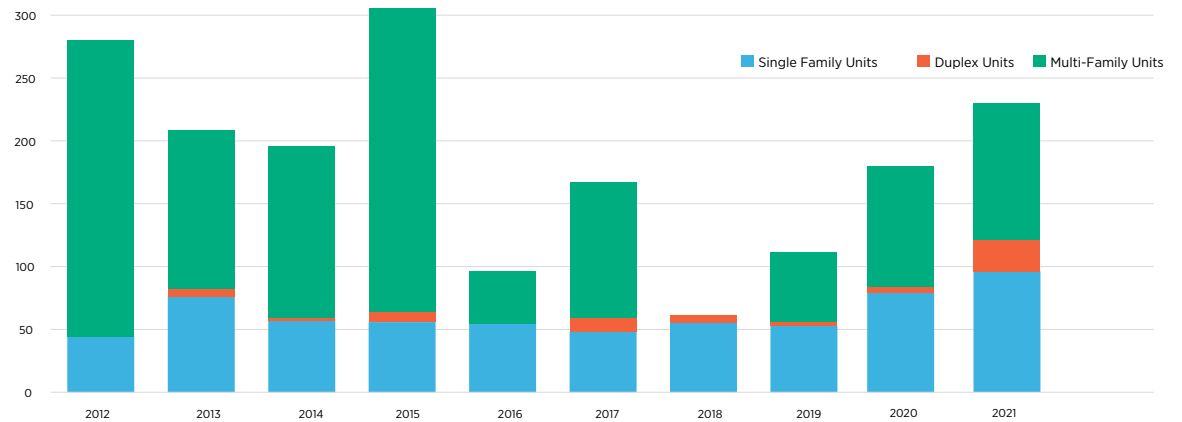
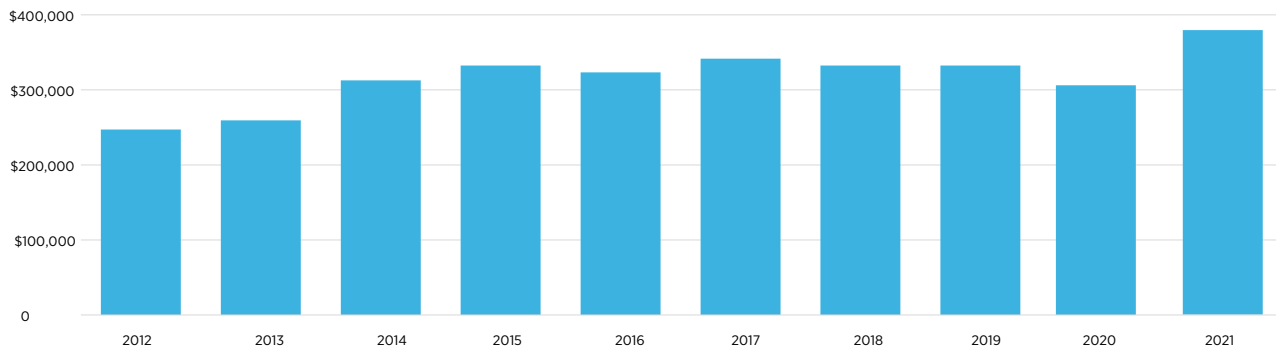


FIGURE 35: CITY OF APPLETON EXISTING HOME VALUES, 2019

	APPLETON		CSA		WISCONSIN	
Less than \$50,000	622	3.0%	3,086	2.7%	68,691	4.3%
\$50,000 to \$99,999	1,210	5.9%	10,370	9.1%	169,969	10.6%
\$100,000 to \$149,999	6,034	29.5%	27,253	23.8%	272,125	17.0%
\$150,000 to \$199,999	6,914	33.8%	27,587	24.1%	305,534	19.0%
\$200,000 to \$299,999	3,814	18.6%	27,329	23.9%	407,783	25.4%
\$300,000 to \$499,999	1,516	7.4%	14,989	13.1%	285,099	17.8%
\$500,000 to \$999,999	292	1.4%	3,251	2.8%	79,888	5.0%
\$1,000,000 or more	72	0.4%	626	0.5%	14,817	0.9%
Median (dollars)	\$165,600		\$176,100		\$197,200	

*Home values downtown are estimated at a median \$133,000 and average \$183,000 in 2021
 Source: American Community Survey (2019 1-year estimates); ESRI

FIGURE 36: CITY OF APPLETON AVERAGE NEW HOME VALUE, 2012-2021



restrictive lending practices, more young households who traditionally enter the market as renters, and pent-up demand after nearly two decades of limited rental construction.

- Appleton's share of renter-occupied housing is increasing, aligning with the ten-year construction trends.
- New home values were essentially unchanged from 2015 to 2020, but values had a large price increase in 2021. The increase is related to inflation related to material and labor costs, and increasing demand for housing in the region.
- Overall, existing home values in Appleton are lower than the region and much lower than the statewide median. The older housing stock of homes valued under \$200,000 is a primary reason. These are affordable options for many. However, this does not indicate the quality or availability of these homes.
- Residential home sales since 2017 reflect the high demand and/or low supply of housing in the region. The significantly increasing average sales price of homes coupled with lower inventory sold and days on the market indicates an unbalanced market. For example, the average sales price of single-family homes in Appleton increased by 36% since 2017 (an 8% annual rate) when the consumer price index during the same period increased by about 8% (a 1.9% annual rate).

FIGURE 37: MULTI-FAMILY SALES, 2017-2021

YEAR	# SOLD	AVG LIST PRICE	AVG SALE PRICE	SALE/LIST RATIO	AVG DAYS ON MARKET	AVG SQ FT	AVG # OF UNITS/BUILDING
2017	57	\$147,345	\$142,146	96.47%	89	2,322	2.4
2018	84	\$146,266	\$142,526	97.44%	72	2,244	2.24
2019	77	\$149,933	\$146,545	97.74%	69	2,135	2.13
2020	68	\$160,268	\$158,287	98.76%	70	2,132	2.17
2021	65	\$175,437	\$177,550	101.20%	56	2,030	2.05

Source: Wisconsin Multiple Listing Service

FIGURE 38: SINGLE-FAMILY SALES, 2017-2021

YEAR	# SOLD	AVG LIST PRICE	AVG SALE PRICE	SALE/LIST RATIO	AVG DAYS ON MARKET	AVG SQ FT
2017	1,032	\$176,584	\$174,834	99.01%	56	1,921
2018	1,071	\$193,346	\$190,829	98.70%	59	1,966
2019	1,000	\$200,968	\$200,068	99.55%	66	1,972
2020	1,081	\$217,857	\$218,915	100.49%	64	1,961
2021	868	\$240,187	\$247,241	102.94%	56	1,992

Source: Wisconsin Multiple Listing Service

HOUSING MARKET FORECASTS

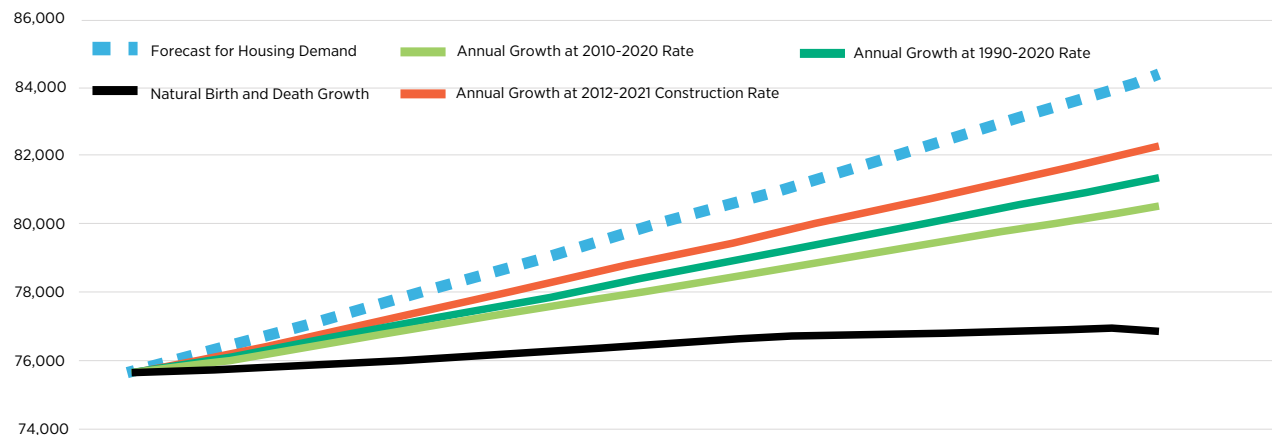
What. Forecast potential housing demand based on population growth, past trends, and household characteristics.

Why the forecast matters. Future population growth will increase pressure for land development across the city. The demand for housing is a critical driver because growth cannot occur without places for people to live. A housing demand forecast indicates construction needs that could, in part, be satisfied in downtown Appleton.

Population Forecast

- If the city grew based on 2010 to 2020 construction trends, the city would grow at about 0.54% annually and reach 79,856 people by 2030. However, stakeholders express the need for more housing supply than past construction levels. Also, the region is experiencing a higher annual growth rate, indicating that Appleton can capture regional growth if there are places to live.
- Therefore, the figure below illustrates a slightly higher forecast at a 0.70% annual growth rate. This growth rate is more than historical trends but represents the potential for housing production to meet pent-up demand. The growth rate can be reached through reuse, redevelopment, and new construction.

FIGURE 39: CITY OF APPLETON POPULATION FORECAST 2020-2035



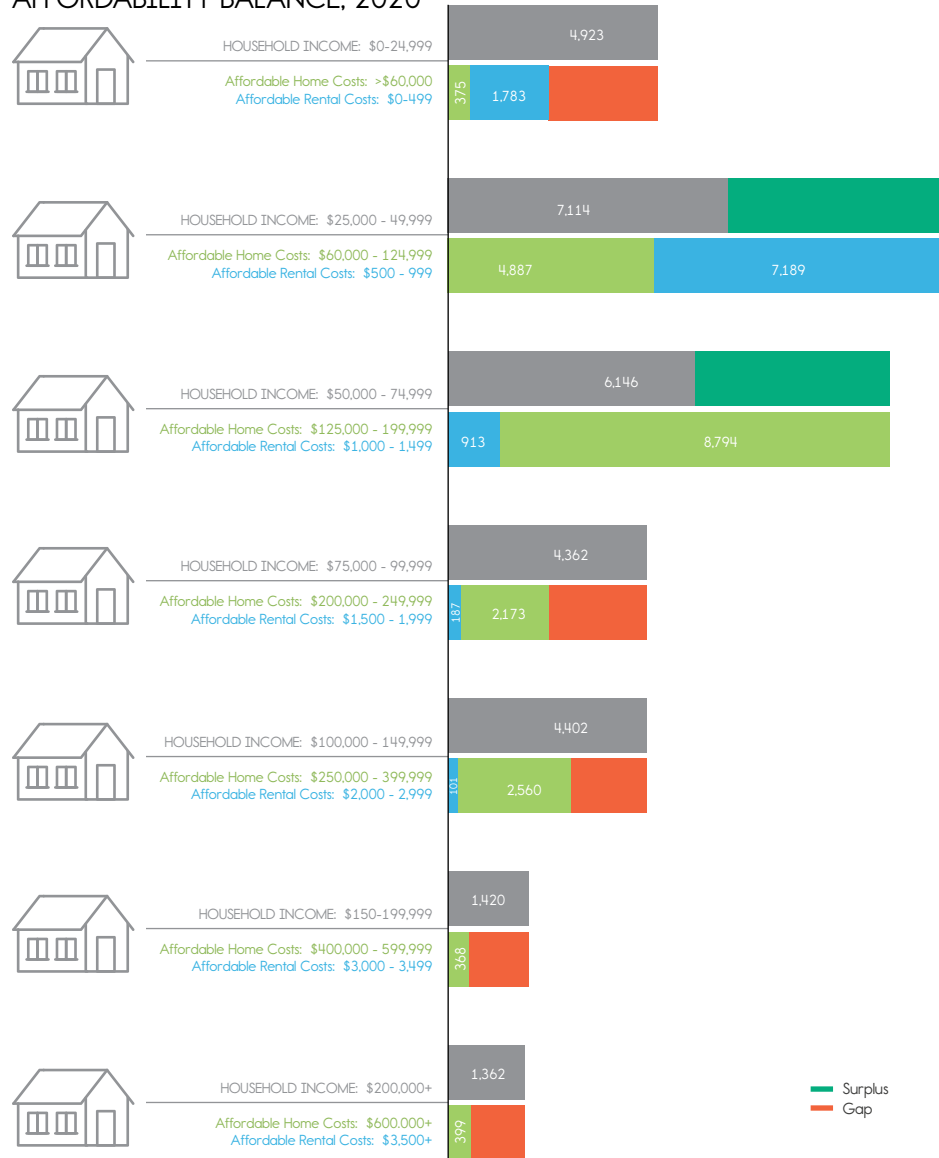
HOUSING AFFORDABILITY NEEDS

The distribution of existing housing by price point provides housing supply and demand indicators. The figures below illustrate the number of households by income range versus the number of owner and renter units available based on affordable ranges that households pay less than 30% of income on housing.

- Appleton and the region have a large stock of housing affordable to households making between \$25,000 and \$75,000 annually.
 - While it appears there are many units available to households making between \$25,000 and \$75,000, these units are filled by higher-income households. Therefore, they are often unavailable to households in this income range.

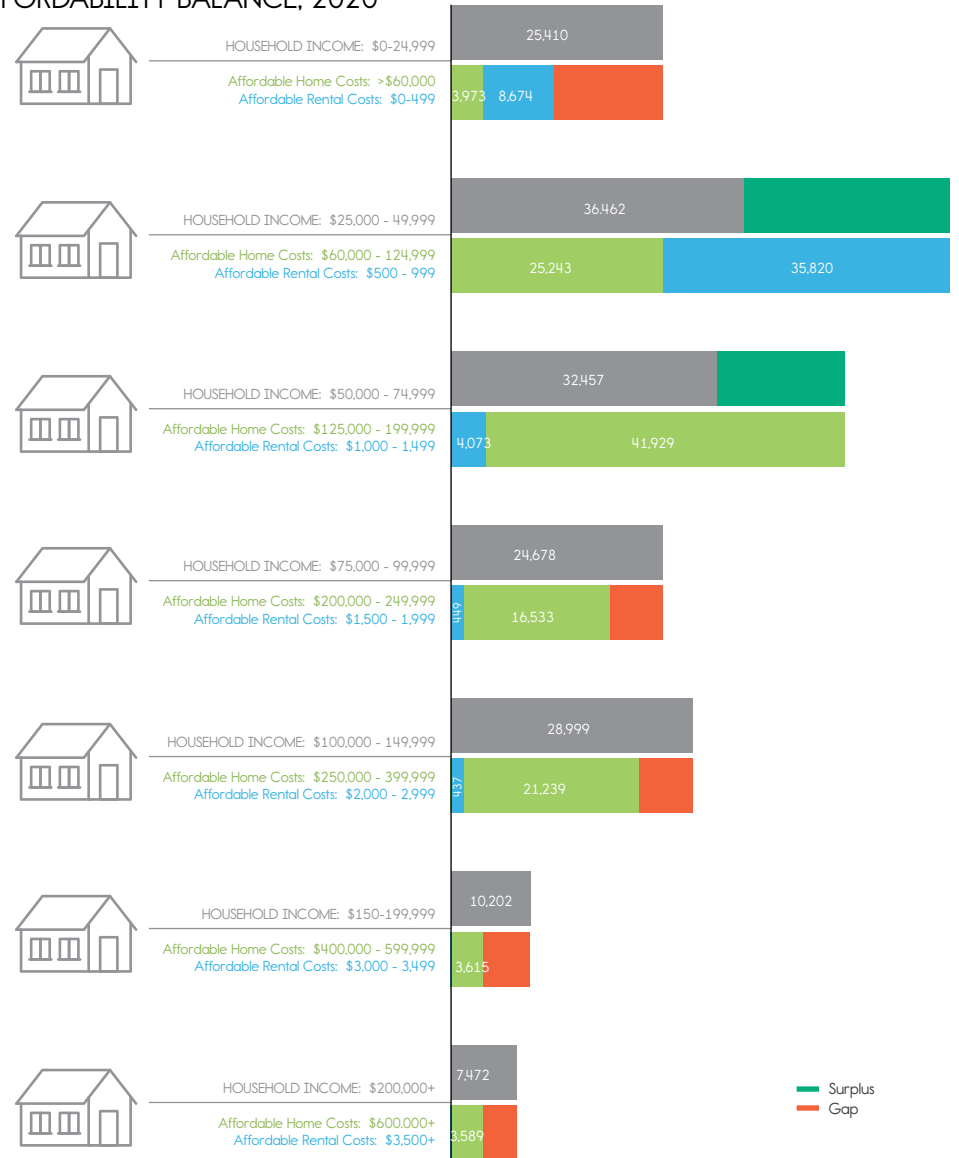
- Many households with incomes over \$75,000 fill units also attainable to lower-income households, thus creating a shortage of housing units for many first-time home buyers and those looking to step up from their first home.
 - They do this for various reasons, including housing costs and neighborhood preferences but also fewer options at higher prices.
 - Some move-up housing may create a filtering effect, but a greater variety of product types at more moderate rates will likely have a greater impact on the market than attracting households to price points over \$600,000.
- Lower-income households are impacted more by the lack of housing at the higher price points due to the competition that it creates for the existing units that are affordable to them.

FIGURE 41: CITY OF APPLETON HOUSING AFFORDABILITY BALANCE, 2020



Source: American Community Survey (2016-2020 Estimates); RDG Planning & Design

FIGURE 42: APPLETON COMBINED STATISTICAL AREA HOUSING AFFORDABILITY BALANCE, 2020



Source: American Community Survey (2016-2020 Estimates); RDG Planning & Design

- While there is a gap in affordable options for households making less than \$25,000, it is not as high as indicated in the figures. This is because households making less than \$25,000 also include some retirees living on fixed incomes with no mortgages remaining and college students receiving housing assistance.

HOUSING DEMAND

Appleton's projected housing need stems from a demand model that builds on the population forecast, construction trends, and regional analysis to forecast the demand for additional housing. The model includes the following assumptions:

- The household population will remain stable through 2030. Meaning the proportion of the population in group quarters such as institutional settings remains the same.
- Average people per household slightly declines over the period with more older households.
- Unit demand is calculated at the end of the period by dividing the household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy rate provides housing choices for residents moving to the community. The 2020 Census is reporting a vacancy rate of around 4.4%, and the 2020 American Community Survey reports a rate

of 3.7%. A 5-6% vacancy rate is considered a healthy market. The model increases the rate over time, which means more units are needed to satisfy pent-up demand and increase the number of units on the market at any one time.

- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units that will support a healthy housing market.
- Replacement need is the number of housing units demolished or converted to other uses. For example, homes in poor condition or obsolete or redevelopment of an existing residential site. This also includes accidents resulting in demolition, such as fires.
- Cumulative need shows the number of total units needed between 2020 and the year at the end of the period.

The figure above shows an average annual construction need of about 301 units. This rate is more than the past ten-year trend at about 173 units annually. However, this is necessary and feasible to meet local demand.

HOUSING DEVELOPMENT PROGRAM

Building on the demand model, the development program forecasts production targets for owner and renter-occupied units based on these assumptions:

- Distributions are based on the % of households within each income range.
- Owner-occupied units will be distributed in proportion to the income distributions of households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- The city currently has about 65% owner-occupied and 35% renter-occupied units. However, about 65% of residential construction from 2010 to 2020 were multi-family units (some could be owner units).
 - The increasing cost of construction and land will likely continue to support higher density owner-occupied configurations and rental units in the near term. But long-term, there needs to be more options for new families to own their homes. To meet this demand, the demand model assumes a 60/40 split between rental and ownership units. Some ownership units can still be in high-density settings, such as condos within multi-family buildings.
- Rental units price under \$650 a month cannot be provided by the private market alone.
 - New rental housing construction traditionally demands rents in the range of \$1.30 or more per square foot. Therefore, to produce housing priced below \$650 per month, programs like low-income housing tax credits will need to be leveraged.

- Some units renting below \$650 a month can also be made available by producing higher-priced units with newer amenities and fixtures. Some renters in less expensive units may opt for these new units and thus “filter” out of the less expensive units.
- Many ownership units priced below \$200,000 will have to be accommodated within the existing housing stock.
 - Products being constructed today will not meet demand at this price point. This demand will only be met through older existing units and the construction of products in denser configurations with land, infrastructure, or homeowner cost assistance.

FIGURE 43: TOTAL HOUSING DEMAND FORECAST AT 0.70% ANNUAL POPULATION GROWTH RATE

	2020	2025	2030	TOTAL
Population at End of Period	75,644	78,329	81,109	
Household Population at End of Period	73,114	75,709	78,396	
Average People Per Household	2.45	2.45	2.44	
Household Demand at End of Period	29,842	30,965	32,130	
Projected Vacancy Rate	4.0%	4.8%	5.5%	
Unit Needs at End of Period	31,086	32,509	34,000	
Replacement Need (total lost units)		50	50	100
Cumulative Need During Period		1,473	1,541	3,014
Average Annual Construction Need	Total Need	295	308	301

Source: RDG Planning & Design. According to the Appleton 2021 Development Trends Report, there are approximately 394 single-family lots available for sale in established subdivisions

FIGURE 44: HOUSING DEVELOPMENT PROGRAM BY PRICE POINT

	2025	2030	2020-2030
Total Need	1,400-1,600	1,450-1,650	2,850-3,250
Total Owner Occupied	850-900	900-950	1,750-1,850
Affordable Low: <\$125,000	Accommodate in the existing housing stock		
Affordable Moderate: \$125k-\$200,000	29%		
Moderate Market: \$200k-\$250,000	24%		
Market: \$250k-\$400,000	27%		
High Market: Over \$400,000	20%		
Total Renter Occupied	550-600	600-650	1,150-1,250
Low: Less than \$650	Will not be supplied by the market		
Affordable: \$650-\$1,000	31%		
Market: \$1,000-\$1,500	27%		
High Market: \$1,500+	21%		

Source: RDG Planning & Design

Downtown Market Potential

What. Detailed retail and business data snapshot for downtown Appleton. Data helps identify types of cluster advantages that Appleton may have and the market sectors that attract spending into Appleton (surplus sectors) and those market sectors where spending is not captured (leakage or gap sectors). Interpreting this analysis can help identify new businesses potentially supported by capturing lost spending.

What the data means for Appleton:

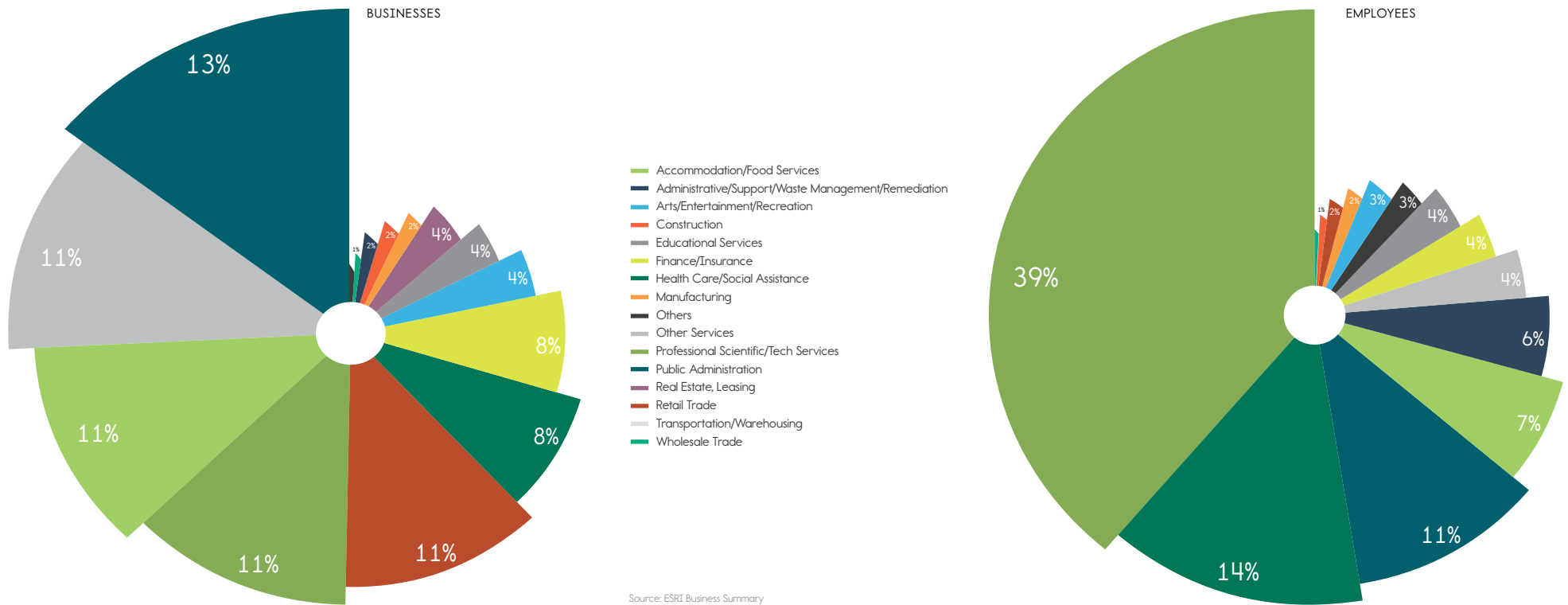
- The decreasing estimate of people living downtown as of 2021 are related to smaller household sizes associated with increased rental options. This population is younger than the city but has risen to median age of 31.3 in 2021. As a result, the median household income of people living downtown is also lower than the overall city.
- The downtown business environment is relatively diverse, with higher clusters of retail trade, food services, public administration, and professional tech services. Scientific and tech services are a major employment base for the downtown and a possible future growth cluster opportunity. These may be employees with higher-paying jobs that can afford higher rents or living arrangements downtown.
 - Other essential employees like those in health care and social assistance may desire to live closer to their employer, but prices may exclude them.

FIGURE 45: DOWNTOWN SNAPSHOT

	2000	2010	2021	2026*
Population**	9,369	8,936	8,847	9,063
Household Size	2.21	2.13	2.11	2.09
Owner	46%	43%	40%	41%
Renter	49%	48%	48%	48%
Vacant	5%	9%	12%	11%
Median Household Income			\$47,591	\$50,499
Median Home Value			\$133,808	\$185,374
Median Age		29.1	31.3	32.0

*Projection from ESRI **About 19% of the population in 2010 was estimated to live in group quarters such as dormitories.
 SOURCE: ESRI Community Profile – 1.5 square mile downtown area

FIGURE 46: DOWNTOWN APPLETON EMPLOYMENT BY BUSINESSES AND EMPLOYEES, 2021



DOWNTOWN HOUSING DEMAND

The City has development agreements or municipal approval for an additional 461 new residential building units, which will be built before 2024. These units

represent 15% of the citywide’s 10-year unit demand through 2030. Considering the current household size of 2.11 people per household, these units represent 18% of the forecasted 2030 city population.

Building permit data suggests that downtown

represents a desirable market for residential development and will be a significant contributor to future growth in Appleton. Recent downtown residential supply could also be attributed to the relative expense of developing new greenfield sites in Appleton and the value return from developing

downtown. However, the average of 154 units a year from 2020 to 2023 is not expected to sustain through 2030 based on land availability, long-term market cycles, and steady absorption of these 461 units.

Assumptions:

- Appleton's growth rate of 0.7% will result in a 2030 population forecast of 81,109, or an additional 5,465 people.
- Downtown represents 30% of the total 2030 population forecast growth from 2020 to 2030, or about 1,600-1,700 people
- The average household size in downtown remains steady at 2.11 people per household.
- Unit demand considers some vacancies need to allow unit choice and mobility of residents.
- Unit demand for downtown will have a higher split of renters to owners, meaning downtown will help fill more of the need for rental units at all price points across the city. Currently, about 48% of downtown residents are renters.

Based on these assumptions, the housing unit demand for downtown ranges from 750-800 units between 2020 to 2030, representing about 25% of total citywide demand. In other words, this study forecasts about 340 to 410 additional units above the 461 units coming online before 2024.

Factors that can influence the market forecast:

- Population growth slows down or increases.
- Affordability of constructing building units.
- Household size increases.

PROXIMITY CHARACTERISTICS AND PEER CITIES

Downtowns have unique characteristics to each city. These characteristics are partially framed by the surrounding demographics and potential demand for different services. The figure below shows demographic and retail characteristics in a ten-mile drive around downtowns in similarly sized Wisconsin cities. These downtowns attract significant spending outside the ten-minute radius (negative retail gap) in all situations. Appleton attracts the most retail spending of the comparison cities.

FIGURE 47: DOWNTOWN SNAPSHOT COMPARISON, 2021

Within a 10 min. drive from the center of downtown	EAU CLAIRE	APPLETON	OSHKOSH	GREEN BAY
Population	69,572	106,821	62,624	101,360
Household	28,590	44,496	26,825	43,113
Median Disposable Income	\$45,332	\$45,467	\$39,797	\$37,364
Per Capita Income	\$29,426	\$30,929	\$26,571	\$26,169
Total Retail Trade and Food & Drink				
Demand	\$842,064,248	\$1.45 billion	\$742,170,929	\$1.17 billion
Supply	\$1.38 billion	\$2.58 billion	\$1.05 billion	\$1.88 billion
Retail Gap	(\$539,234,986)	(\$1.12 billion)	(\$310,678,671)	(\$706,535,301)
Number of businesses	612	983	547	848
Ratio of residents to business	114	109	114	120
Total Retail Trade				
Demand	\$759,808,666	\$1.31 billion	\$671,160,027	\$1.06 billion
Supply	\$1,260,720,628	\$208,330,653	\$937,702,989	\$1.68 billion
Retail Gap	(\$500,911,962)	(\$1.06 billion)	(\$266,542,962)	(\$626,884,936)
Number of businesses	419	681	363	582
Ratio of residents to business	166	157	172	174
Total Food & Drink				
Demand	\$82,255,582	\$141,231,414	\$71,010,902	\$112,501,487
Supply	\$120,578,606	\$208,330,653	\$115,146,610	\$192,148,852
Retail Gap	\$(38,323,024)	\$(67,099,239)	\$(44,135,708)	\$(79,647,365)
Number of businesses	193	302	183	266
Ratio of residents to business	360	354	342	381

Source: ESRI Retail Marketplace Profile, 2021

Retail Market Snapshot

Appleton is part of a larger commercial base. As a result, some adjacent cities will naturally fill store and service gaps in Appleton. Markets where Appleton residents shop and Appleton's potential retail draw are shown in Figure 48.

City of Appleton

The jurisdictional boundaries of Appleton are a baseline of current expenditures of residents and the revenue of businesses.

Primary Market

The primary market area is the Appleton-Oshkosh-Neenah Combined Statistical Area, excluding the City of Appleton. Residents of each respective city do some daily shopping in their community and larger commercial centers in the area based on preferences or needs.

Secondary Market

The secondary market extends in all directions to capture other cities where people may travel to the closest regional trade center for a greater selection of goods and services, excluding Appleton. While residents of this area may shop locally for typical needs, larger markets such as the Fox Cities exert a powerful draw for unique or large purchase items.

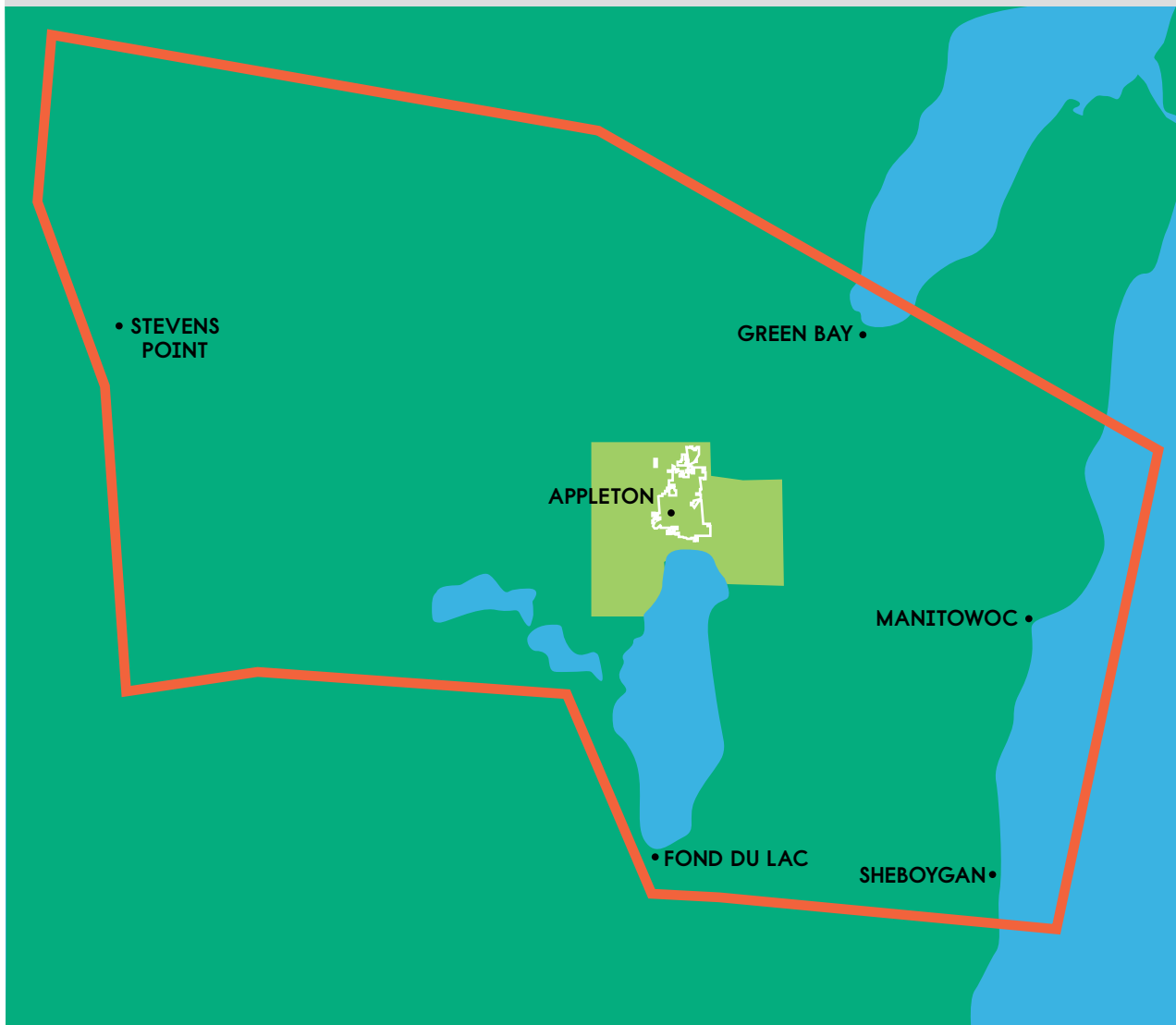
RETAIL GAPS AND SURPLUSES

One way of evaluating Appleton's retail role in the region is to consider its share of total regional retail sales and identify the gap between consumer demand (expenditures) and retail sales within each retail sector.

- Appleton's share of adjusted retail sales in the total market area (primary and secondary) is about 8.7%
- About 25% of adjusted retail sales in the Combined Statistical Area occur in Appleton. In 2020, Appleton's population accounted for about 18% of the total population in the Combined Statistical Area
- Appleton's share of food and drink sales, such as restaurants, special food services, and bars is about 35.5% of the total sales in the CSA.

Overall, the City of Appleton attracts a spending surplus from people outside the city. This could be non-local employees, people making special trips to commercial centers, or people going to unique destinations like downtown. Similarly, the CSA excluding Appleton also attracts spending from the larger region. However, the CSA around Appleton has a gap in spending on food and drink. In other words, people living in the CSA outside of Appleton spend more on food and drink in other areas – including Appleton.

FIGURE 48: RETAIL MARKET AREAS



Source: ESRI

In figures 49 through 51, a negative value results from demand exceeding supply, indicating leakage of consumer dollars to outside markets. In other words, residents have dollars to spend, but a portion of those dollars are spent outside their respective market area. Conversely, a positive value results from sales exceeding demand and indicates a flow of regional dollars into the area's market.

There are spending gaps for specific retail categories in each market area. The following retail categories represent gaps in the market that are unmet in that respective market area.

Appleton

- Furniture and Home Furnishing Stores.**
 These stores appear to be satisfied outside of Appleton in other cities in the Fox Cities area. There could be room to fill a gap in Appleton, but the supply in the adjacent area likely serves the current needs of Appleton residents.
- Health and Personal Care Stores.**
 There is a surplus of these stores in the Fox Valley area but a gap in Appleton. These stores' unique experiences or products could be a growth opportunity in Appleton, especially if the experience attracts people from the larger region.
- Clothing and Clothing Accessory Stores.**
 There is a surplus of these stores in the Fox Cities, but a gap in Appleton.
- Sporting Goods, Hobby, Book & Music Stores.** These are stores where many Appleton residents travel to other areas for shopping.

Primary Market

- Food and Drink.** Interestingly, more spending is going to establishments outside the Combined Statistical Area (excluding Appleton) than those within the area. Most of this leakage is in restaurants and other eating places. This spending pattern is an opportunity for Appleton to continue growing the capture rate of spending.

FIGURE 49: ADJUSTED RETAIL SALES (EXCLUDING AUTO AND ONLINE RELATED STORES)

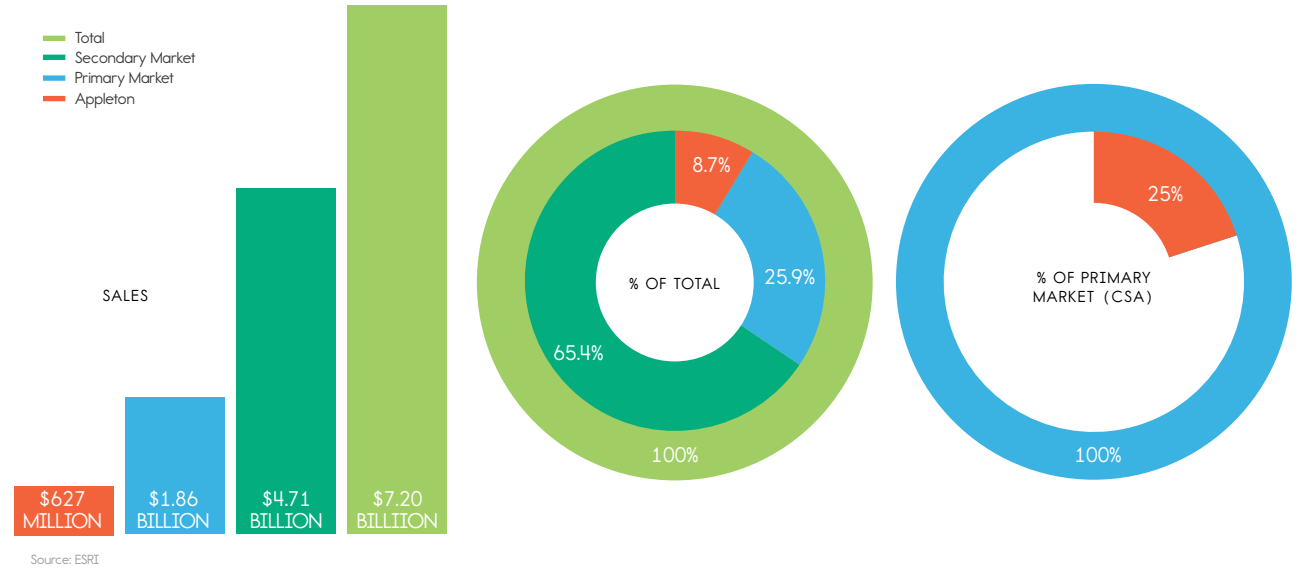


FIGURE 49: ADJUSTED RETAIL SALES (EXCLUDING AUTO AND ONLINE RELATED STORES)

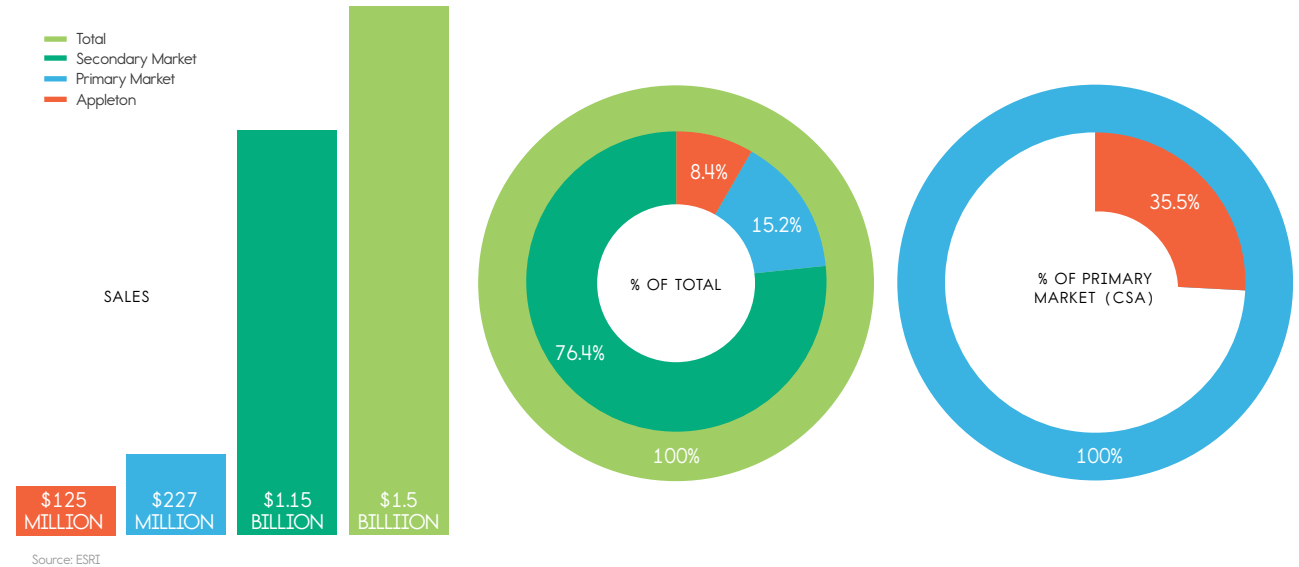


FIGURE 51: RETAIL GAPS AND SURPLUSES

(Leakage)/Surplus	CITY OF APPLETON	PRIMARY MARKET	SECONDARY MARKET	TOTAL MARKET AREA
Retail Adjustment + Food and Drink	\$271,329,349	\$922,797,087	\$478,565,223	\$1,672,691,659
Retail Adjustment	\$247,943,374	\$943,692,098	\$457,566,640	\$1,649,202,112
Total Food and Drink	\$23,385,975	(\$20,895,011)	\$20,998,583	\$23,489,547
Furniture and Home Furnishings Stores	(\$13,346,908)	\$95,228,421	(\$5,321,430)	\$76,560,083
Electronics and Appliance Stores	\$6,763,694	\$1,932,848	\$35,960,581	\$44,657,123
Bldg Materials, Garden Equipment and Supply Stores	\$65,468,653	\$53,245,707	\$255,433,809	\$374,148,169
Food and Beverage Stores	\$27,590,813	\$154,406,846	\$393,406,673	\$575,404,332
Health and Personal Care Stores	(\$8,648,868)	\$25,731,740	(\$66,562,854)	(\$49,479,982)
Clothing and Clothing Accessories Stores	(\$21,565,109)	\$79,813,588	(\$125,427,483)	(\$67,179,004)
Sporting Goods, Hobby, Book and Music Stores	(\$10,764,099)	\$52,798,709	\$145,505,565	\$187,540,175
General Merchandise Stores	\$71,644,649	\$606,688,506	(\$98,055,930)	\$580,277,225
Miscellaneous Store Retailers	\$26,835,597	\$11,907,243	(\$8,306,209)	\$30,436,631
Nonstore Retailers*	(\$19,327,483)	(\$50,089,957)	(\$77,183,241)	(\$146,600,681)

*Nonstore retailers do not add to building footprint space but help know the magnitude of online shopping. This category will nearly always show a leakage. Full detail tables included in the Appendix
 SOURCE: ESRI

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appendix

**SUMMARY DEMOGRAPHICS:
CITY OF APPLETON**

2021 Population	76,056
2021 Households	30,748
2021 Median Disposable Income	\$47,877
2021 Per Capita Income	\$31,689

SOURCE: ESRI

APPLETON

	DEMAND (EXPENDITURES)	SUPPLY (SALES)	# OF BUSINESSES	OPPORTUNITY GAP/SURPLUS
Total Retail Trade and Food & Drink	\$1,044,493,956	\$1,076,893,056	552	\$32,399,100
Total Retail Trade	\$942,685,840	\$951,698,965	355	\$9,013,125
Total Food & Drink	\$101,808,116	\$125,194,091	197	\$23,385,975
Retail Adjustment (minus auto and non-store)	\$379,065,616	\$627,008,990	242	\$247,943,374
Retail Adjustment + Food and Drink	\$480,873,732	\$752,203,081	439	\$271,329,349
Motor Vehicle & Parts Dealers	\$201,312,434	\$115,031,434	37	(\$86,281,000)
Automobile Dealers	\$159,311,424	\$88,466,658	18	(\$70,844,766)
Other Motor Vehicle Dealers	\$25,724,816	\$6,826,990	4	(\$18,897,826)
Auto Parts, Accessories & Tire Stores	\$16,276,194	\$19,737,786	15	\$3,461,592
Furniture & Home Furnishings Stores	\$30,835,408	\$17,488,500	23	(\$13,346,908)
Furniture Stores	\$18,486,568	\$11,323,618	10	(\$7,162,950)
Home Furnishings Stores	\$12,348,840	\$6,164,882	13	(\$6,183,958)
Electronics & Appliance Stores	\$31,272,596	\$38,036,290	21	\$6,763,694
Bldg Materials, Garden Equip. & Supply Stores	\$63,812,282	\$129,280,935	28	\$65,468,653
Bldg Material & Supplies Dealers	\$57,385,336	\$128,715,048	26	\$71,329,712
Lawn & Garden Equip & Supply Stores	\$6,426,946	\$565,887	2	(\$5,861,059)
Food & Beverage Stores	\$147,300,054	\$174,890,867	27	\$27,590,813
Grocery Stores	\$128,289,581	\$161,500,016	17	\$33,210,435
Specialty Food Stores	\$10,607,584	\$4,298,918	6	(\$6,308,666)
Beer, Wine & Liquor Stores	\$8,402,889	\$9,091,933	4	\$689,044
Health & Personal Care Stores	\$59,241,352	\$50,592,484	36	(\$8,648,868)
Gasoline Stations	\$111,413,437	\$82,056,623	24	(\$29,356,814)

APPLETON

	DEMAND (EXPENDITURES)	SUPPLY (SALES)	# OF BUSINESSES	OPPORTUNITY GAP/SURPLUS
Clothing & Clothing Accessories Stores	\$40,918,420	\$19,353,311	27	(\$21,565,109)
Clothing Stores	\$26,568,976	\$8,759,870	14	(\$17,809,106)
Shoe Stores	\$5,929,492	\$4,319,361	5	(\$1,610,131)
Jewelry, Luggage & Leather Goods Stores	\$8,419,952	\$6,274,080	8	(\$2,145,872)
Sporting Goods, Hobby, Book & Music Stores	\$24,481,380	\$13,717,281	37	(\$10,764,099)
Sporting Goods/Hobby/Musical Instr Stores	\$20,585,690	\$11,717,615	27	(\$8,868,075)
Book, Periodical & Music Stores	\$3,895,690	\$1,999,666	10	(\$1,896,024)
General Merchandise Stores	\$168,039,600	\$239,684,249	17	\$71,644,649
Department Stores Excluding Leased Depts.	\$127,867,493	\$203,869,477	10	\$76,001,984
Other General Merchandise Stores	\$40,172,107	\$35,814,772	7	(\$4,357,335)
Miscellaneous Store Retailers	\$36,738,793	\$63,574,390	68	\$26,835,597
Florists	\$1,782,675	\$1,218,436	3	(\$564,239)
Office Supplies, Stationery & Gift Stores	\$8,641,559	\$10,256,836	21	\$1,615,277
Used Merchandise Stores	\$8,387,739	\$26,254,333	13	\$17,866,594
Other Miscellaneous Store Retailers	\$17,926,820	\$25,844,785	31	\$7,917,965
Nonstore Retailers	\$27,320,084	\$7,992,601	10	(\$19,327,483)
Electronic Shopping & Mail-Order Houses	\$22,261,835	\$4,577,883	5	(\$17,683,952)
Vending Machine Operators	\$2,013,407	\$190,187	1	(\$1,823,220)
Direct Selling Establishments	\$3,044,842	\$3,224,531	4	\$179,689
Food Services & Drinking Places	\$101,808,116	\$125,194,091	197	\$23,385,975
Special Food Services	\$2,539,868	\$2,935,685	4	\$395,817
Drinking Places - Alcoholic Beverages	\$7,418,625	\$9,271,286	20	\$1,852,661
Restaurants/Other Eating Places	\$91,849,623	\$112,987,120	173	\$21,137,497

Source: ESRI

**SUMMARY DEMOGRAPHICS:
PRIMARY AREA (CSA)**

2021 Population	248,277
2021 Households	101,140
2021 Median Disposable Income	\$51,588
2021 Per Capita Income	\$33,788

SOURCE: ESRI

PRIMARY AREA: CSA

APPLETON

	DEMAND (EXPENDITURES)	SUPPLY (SALES)	# OF BUSINESSES	OPPORTUNITY GAP/SURPLUS
Total Retail Trade and Food & Drink	\$2,554,304,172	\$3,719,119,745	1807	\$1,164,815,573
Total Retail Trade	\$2,306,196,429	\$3,491,907,012	1,231	\$1,185,710,583
Total Food & Drink	\$248,107,743	\$227,212,732	575	(\$20,895,011)
Retail Adjustment (minus auto and non-store)	\$920,726,413	\$1,864,418,511	758	\$943,692,098
Retail Adjustment + Food and Drink	\$1,168,834,156	\$2,091,631,243	1,333	\$922,797,087
Motor Vehicle & Parts Dealers	\$496,166,618	\$680,699,021	171	\$184,532,403
Automobile Dealers	\$392,600,206	\$511,390,039	82	\$118,789,833
Other Motor Vehicle Dealers	\$63,840,040	\$66,801,169	28	\$2,961,129
Auto Parts, Accessories & Tire Stores	\$39,726,371	\$102,507,812	62	\$62,781,441
Furniture & Home Furnishings Stores	\$75,699,070	\$170,927,491	84	\$95,228,421
Furniture Stores	\$44,950,261	\$141,865,249	43	\$96,914,988
Home Furnishings Stores	\$30,748,809	\$29,062,241	42	(\$1,686,568)
Electronics & Appliance Stores	\$76,088,005	\$78,020,853	62	\$1,932,848
Bldg Materials, Garden Equip. & Supply Stores	\$159,770,022	\$213,015,729	105	\$53,245,707
Bldg Material & Supplies Dealers	\$143,931,223	\$207,242,314	89	\$63,311,091
Lawn & Garden Equip & Supply Stores	\$15,838,799	\$5,773,415	17	(\$10,065,384)
Food & Beverage Stores	\$357,128,304	\$511,535,150	86	\$154,406,846
Grocery Stores	\$311,086,017	\$463,412,242	46	\$152,326,225
Specialty Food Stores	\$25,712,767	\$26,897,360	28	\$1,184,593
Beer, Wine & Liquor Stores	\$20,329,520	\$21,225,548	12	\$896,028
Health & Personal Care Stores	\$144,805,835	\$170,537,575	96	\$25,731,740
Gasoline Stations	\$272,016,907	\$241,531,436	89	(\$30,485,471)

PRIMARY AREA: CSA

APPLETON

	DEMAND (EXPENDITURES)	SUPPLY (SALES)	# OF BUSINESSES	OPPORTUNITY GAP/SURPLUS
Clothing & Clothing Accessories Stores	\$99,248,064	\$179,061,652	147	\$79,813,588
Clothing Stores	\$64,479,778	\$127,727,486	90	\$63,247,708
Shoe Stores	\$14,486,723	\$26,969,596	29	\$12,482,873
Jewelry, Luggage & Leather Goods Stores	\$20,281,562	\$24,364,570	28	\$4,083,008
Sporting Goods, Hobby, Book & Music Stores	\$59,714,448	\$112,513,157	101	\$52,798,709
Sporting Goods/Hobby/Musical Instr Stores	\$50,359,479	\$106,348,850	78	\$55,989,371
Book, Periodical & Music Stores	\$9,354,969	\$6,164,307	23	(\$3,190,662)
General Merchandise Stores	\$409,248,161	\$1,015,936,667	68	\$606,688,506
Department Stores Excluding Leased Depts.	\$311,439,854	\$603,638,333	26	\$292,198,479
Other General Merchandise Stores	\$97,808,307	\$412,298,333	41	\$314,490,026
Miscellaneous Store Retailers	\$89,646,047	\$101,553,290	195	\$11,907,243
Florists	\$4,366,803	\$2,625,601	16	(\$1,741,202)
Office Supplies, Stationery & Gift Stores	\$21,121,594	\$24,889,676	56	\$3,768,082
Used Merchandise Stores	\$20,270,941	\$37,139,198	40	\$16,868,257
Other Miscellaneous Store Retailers	\$43,886,709	\$36,898,816	83	(\$6,987,893)
Nonstore Retailers	\$66,664,949	\$16,574,992	28	(\$50,089,957)
Electronic Shopping & Mail-Order Houses	\$54,454,925	\$7,984,032	13	(\$46,470,893)
Vending Machine Operators	\$4,889,006	\$6,202,951	6	\$1,313,945
Direct Selling Establishments	\$7,321,017	\$2,388,009	9	(\$4,933,008)
Food Services & Drinking Places	\$248,107,743	\$227,212,732	575	(\$20,895,011)
Special Food Services	\$6,208,820	\$1,712,727	14	(\$4,496,093)
Drinking Places - Alcoholic Beverages	\$17,958,598	\$19,029,371	74	\$1,070,773
Restaurants/Other Eating Places	\$223,940,326	\$206,470,635	488	(\$17,469,691)

Source: ESRI

**SUMMARY DEMOGRAPHICS:
SECONDARY AREA**

2021 Population	1,127,603
2021 Households	459,788
2021 Median Disposable Income	\$50,091
2021 Per Capita Income	\$32,284

SOURCE: ESRI

SECONDARY AREA

PRIMARY AREA

	DEMAND (EXPENDITURES)	SUPPLY (SALES)	# OF BUSINESSES	OPPORTUNITY GAP/SURPLUS
Total Retail Trade and Food & Drink	\$11,978,861,559	\$10,781,646,886	8,350	(\$1,197,214,673)
Total Retail Trade	\$10,854,373,949	\$11,963,625,589	5,580	\$1,109,251,640
Total Food & Drink	\$1,124,487,610	\$1,145,486,193	2,770	\$20,998,583
Retail Adjustment (minus auto and non-store)	\$4,250,470,355	\$4,708,036,995	3,378	\$457,566,640
Retail Adjustment + Food and Drink	\$5,374,957,965	\$5,853,523,188	6,148	\$478,565,223
Motor Vehicle & Parts Dealers	\$2,368,387,610	\$2,583,150,919	778	\$214,763,309
Automobile Dealers	\$1,874,640,316	\$2,030,283,145	336	\$155,642,829
Other Motor Vehicle Dealers	\$306,954,299	\$384,152,211	164	\$77,197,912
Auto Parts, Accessories & Tire Stores	\$186,792,997	\$168,715,564	279	(\$18,077,433)
Furniture & Home Furnishings Stores	\$342,575,244	\$337,253,814	313	(\$5,321,430)
Furniture Stores	\$203,834,384	\$235,406,693	136	\$31,572,309
Home Furnishings Stores	\$138,740,860	\$101,847,122	177	(\$36,893,738)
Electronics & Appliance Stores	\$347,198,023	\$383,158,604	266	\$35,960,581
Bldg Materials, Garden Equip. & Supply Stores	\$763,943,713	\$1,019,377,522	556	\$255,433,809
Bldg Material & Supplies Dealers	\$685,069,557	\$901,797,854	434	\$216,728,297
Lawn & Garden Equip & Supply Stores	\$78,874,156	\$117,579,668	122	\$38,705,512
Food & Beverage Stores	\$1,680,867,831	\$2,074,274,504	483	\$393,406,673
Grocery Stores	\$1,466,484,980	\$1,682,403,912	259	\$215,918,932
Specialty Food Stores	\$120,995,641	\$296,435,113	175	\$175,439,472
Beer, Wine & Liquor Stores	\$93,387,210	\$95,435,480	48	\$2,048,270
Health & Personal Care Stores	\$694,553,052	\$627,990,198	438	(\$66,562,854)
Gasoline Stations	\$1,300,060,968	\$1,745,099,819	506	\$445,038,851

SECONDARY AREA

PRIMARY AREA

	DEMAND (EXPENDITURES)	SUPPLY (SALES)	# OF BUSINESSES	OPPORTUNITY GAP/SURPLUS
Clothing & Clothing Accessories Stores	\$445,975,097	\$320,547,614	510	(\$125,427,483)
Clothing Stores	\$291,667,118	\$218,066,953	329	(\$73,600,165)
Shoe Stores	\$65,022,503	\$60,412,409	85	(\$4,610,094)
Jewelry, Luggage & Leather Goods Stores	\$89,285,477	\$42,068,252	96	(\$47,217,225)
Sporting Goods, Hobby, Book & Music Stores	\$273,229,596	\$418,735,161	476	\$145,505,565
Sporting Goods/Hobby/Musical Instr Stores	\$230,536,102	\$388,141,914	404	\$157,605,812
Book, Periodical & Music Stores	\$42,693,494	\$30,593,247	72	(\$12,100,247)
General Merchandise Stores	\$1,897,240,558	\$1,799,184,628	273	(\$98,055,930)
Department Stores Excluding Leased Depts.	\$1,437,457,594	\$1,430,183,698	115	(\$7,273,896)
Other General Merchandise Stores	\$459,782,964	\$369,000,931	158	(\$90,782,033)
Miscellaneous Store Retailers	\$425,257,167	\$416,950,958	883	(\$8,306,209)
Florists	\$20,568,861	\$29,000,710	101	\$8,431,849
Office Supplies, Stationery & Gift Stores	\$96,669,368	\$93,632,879	217	(\$3,036,489)
Used Merchandise Stores	\$92,218,786	\$85,799,084	211	(\$6,419,702)
Other Miscellaneous Store Retailers	\$215,800,152	\$208,518,285	354	(\$7,281,867)
Nonstore Retailers	\$315,085,088	\$237,901,847	98	(\$77,183,241)
Electronic Shopping & Mail-Order Houses	\$251,982,316	\$106,285,089	41	(\$145,697,227)
Vending Machine Operators	\$22,827,291	\$109,447,085	22	\$86,619,794
Direct Selling Establishments	\$40,275,482	\$22,169,672	35	(\$18,105,810)
Food Services & Drinking Places	\$1,124,487,610	\$1,145,486,193	2,770	\$20,998,583
Special Food Services	\$28,714,211	\$52,490,468	67	\$23,776,257
Drinking Places - Alcoholic Beverages	\$80,087,355	\$91,912,597	575	\$11,825,242
Restaurants/Other Eating Places	\$1,015,686,042	\$1,001,083,127	2,129	(\$14,602,915)

Source: ESRI

