



Downtown Laramie Retail Market Analysis and Consumer Intercept Survey



December 2014



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Introduction

Laramie Main Street Alliance (LMSA) retained Community Builders, Inc. (CBI), a consulting firm based in Douglas, Wyoming, to conduct a Retail Market Analysis and Consumer Intercept Survey of the Laramie Main Street service area. This project followed an earlier study that had been completed in 2007 - Historic Downtown Laramie Retail Market Analysis. That study had been completed by Business Resource Group, LLC (BRG). The purpose of this study was to give LMSA and the Laramie Downtown Development Authority (DDA) team a better understanding of the current retail, restaurant, and service environment in downtown Laramie while identifying market opportunities and underutilized space.

The Main Street Approach

"Main Street" is a nationwide approach that works to revitalize historic downtowns. The National Trust for Historic Preservation created the comprehensive preservation-based economic development model in 1977 in reaction to economic decline and threats to traditional architecture in core commercial districts.

LMSA is implementing Main Street's 4-point strategy to revitalize the downtown district, including:

- A Promotion Committee (the Downtown Laramie Business Association) that is charged with enhancing the downtown's unique social, economic, and cultural character through special events and marketing campaigns.
- An Organization Committee serves as Main Street's Human Resources arm, bringing resources (both people and funds) into the program.
- The Design Committee works to make visual improvements to downtown facilities through good design compatible with historic features.
- The Economic Restructuring Committee, which helps existing businesses expand, also recruits new businesses into the district to revitalize underutilized properties. This committee is responsible for the commissioning of this study.

Laramie Main Street Alliance

Laramie was selected as a Wyoming Main Street community in January 2005 and became fully accredited in June of that year. In 2014, the Laramie Main Street Program was recognized as the Program of the Year at the annual Preserve Wyoming conference.

The mission statement of the LMSA is to "preserve historic Downtown Laramie while enhancing its economic and social vitality." LMSA's vision statement is as follows:

Downtown Laramie will be an attractive, vibrant destination for community residents and visitors. The Downtown will offer ample dining, shopping, living, entertainment, and cultural and educational opportunities while remaining a welcoming, pedestrian-friendly neighborhood. The downtown will reflect the civic, academic, economic, social, and

cultural vitality of the entire community while highlighting the historic quality of its traditional architecture and railroad history.

LMSA's Branding Statement:

We are Laramie, Wyoming:

We are a railroad town. It was here, in 1860's, the Transcontinental Railroad put us on the map. Nearly overnight, we grew from a tent town to a city of over 2,000. Today, the Union Pacific is our link to the world and we watch the trains that pass through our downtown with the awe of knowing the role we play in connecting this great nation.

We are a western town. We are proud of our Cowboy culture where we do what has to be done, we live each day with courage, and we always finish what we start. We look to our surroundings with the respect and wonder that inspired the first settlers: our clear blue skies, our snow capped mountains, and the sweeping plains that surround us.

We are a progressive town. It was here that Louisa Ann Swain became the first woman to cast a legal vote in the United States decades before it became a right throughout the country. It is here that people from all cultures and backgrounds still gather to learn, to explore, and to work.

We are a college town. We are home to Wyoming's institutions of higher learning where the young people of the Equality State and places from across the country and the world gather to learn. We are Poke Pride and the welcoming host to the UW family that returns here each year to celebrate the teams in brown and gold.

We are all of these things and more. We are a vibrant downtown where sophisticated shops and restaurants mesh comfortably with relaxed places and down home dives. We are an authentic place with deep appreciation of our past and the role we play to this day. We are Laramie, Wyoming: Spirit of the Bold West.

Downtown Development Authority

The Downtown Development Authority is a City of Laramie board originally created in 1989 that has the following identified goals:

- Assist in development and redevelopment of the central business district
- Assist in overall planning to restore and/or provide for continuance of a healthy central business district
- Prevent/halt deterioration of property values and/or structures within the central business district
- Prevent/halt growth of blighted areas in the central business district
- Promote health, safety, prosperity, security, and general welfare of inhabitants of the central business district.

In 2013 (City of Laramie Resolution No. 2013-29), the DDA and the LMSA were merged into one coordinated entity, with the DDA members joining other members of the Main Street Board to become the Economic Restructuring Committee (one of the four required components of the National Main Street program). Consolidation of the boards was important to streamline operations of both boards and to fulfill the role of the DDA as the economic restructuring entity for the LMSA. Although no plans have been developed to propose a tax, the DDA has the statutory ability to propose a mill levy to help support downtown development.

Main Street Boundaries

The broader Main Street boundary encompasses both the Downtown Laramie Historic District (listed on the National Register of Historic Places) and the Downtown Development Authority boundaries. Laramie's downtown is a vibrant, active, attractive space, enhanced by the Laramie Mural Project with local artists reflecting Laramie's cultural assets

Property owners have the opportunity to opt in or out of the designated Main Street boundaries. This leads to some anomalies and slight gerrymandering of the defined area. The general boundaries of the designated 27-block Main Street boundary include the railroad tracks on the West, Clark Street on the North, 4th Street on the East (with some deviation further east to 7th Street along both sides of Iverson), and Kearney to the South. Clark Street is a natural dividing line on the north with the viaduct that crosses to West Laramie. The Depot building to the south provides a good anchor point at that end. The railroad tracks on the West clearly demarcate Historic Downtown Laramie. The eastern boundaries are a bit more ill-defined as one ventures up Iverson to 7th but stopping at 4th Street at Custer.



Albany County Courthouse - 420 E. Iverson

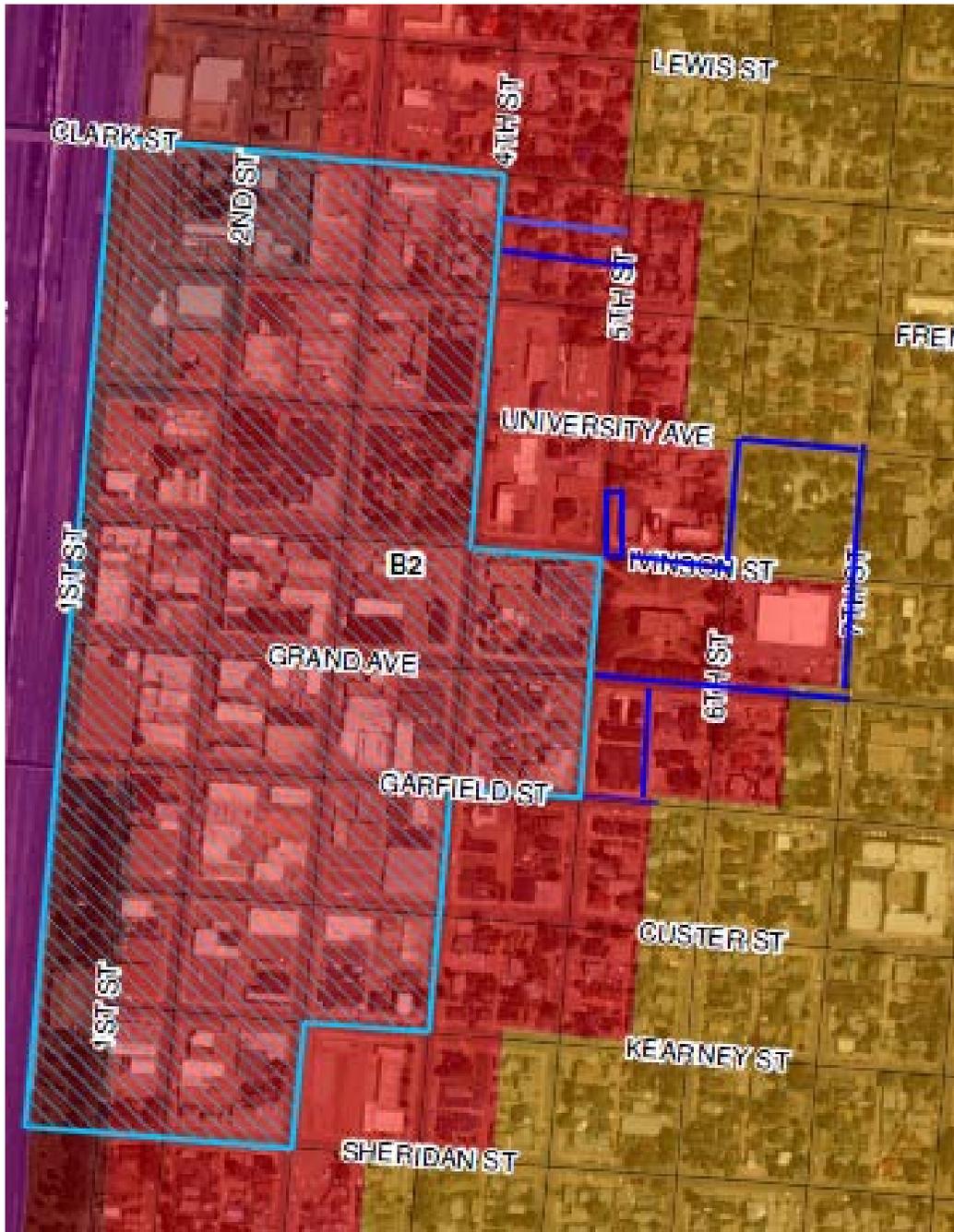


Front Street Tavern - 213 S. 1st



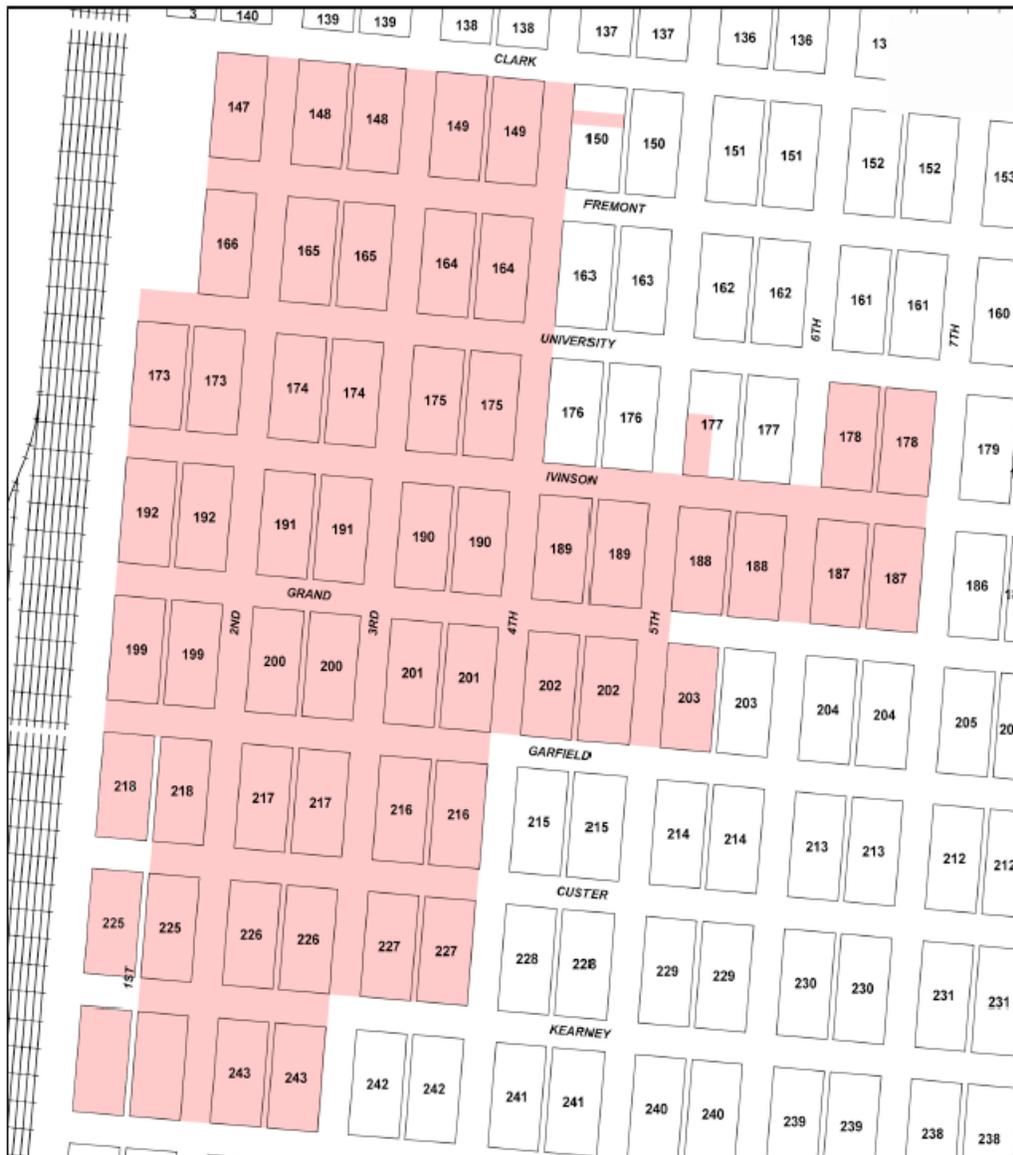
St. Matthew's Cathedral - 104 S. 4th St.

Laramie Downtown District



Designated Main Street Boundary

The dark blue lines in the map above indicate recent modifications to the downtown district; the light blue lines outline the previous district. This area is shown on the following page by block number for easier reference with the Excel data base that accompanies this report.



CBI evaluated the overall size of the district and feels that it fits the vision for Downtown Laramie - it is an attractive, vibrant destination with ample dining, shopping, living, entertainment opportunities. It is pedestrian-friendly and highlights the historic qualities of the community. A couple of general observations about the boundaries:

- The blocks north of University (blocks 166, 165, 164, 147, 148 and 149) define the north end of the district. However, these are, for the most part, not typical businesses or historically significant structures. For example, businesses in this area include Wyoming Automotive Company, Subway, Spic n Span Laundry and Travel Inn. LMSA should make efforts to include this area in promotions and activities so as not to further distance this section from the Downtown culture.
- Block 187 is Advance Autoparts and Ace Hardware, not typical "downtown" businesses.

- Block 178 includes the Laramie Plains Museum on the east. However, the American Legion and Masonic Temple in Block 176 (across from City Hall), are historic structures that could and probably should be brought into the district.



Not in District - American Legion - Iverson and 4th Street - Block 176



In District - Advance Auto Parts - Grand Avenue - Block 187



In District - Travel Inn - Block 148, 3rd and Clark



In District - Spic n Span Laundry - 272 North 4th St.



In District - Block 178 - Laramie Plains Museum

Building and Business Inventory

In order to assess potential economic development opportunities, it is important to understand the current business and retail environment in the area, including the desires and preferences of the consumers who shop Downtown Laramie. One of the major tasks of this project included a Building and Business Inventory of the Downtown Laramie area. CBI conducted a survey of the downtown businesses area in order to create a census of properties in the designated area. This written survey complemented the visual survey and records research conducted by CBI representatives. Ninety-nine (99) out of 258 business surveys were returned.

Downtown Laramie is a mix of commercial and retail businesses, county and municipal services, churches, nonprofit entities and a high percentage of upper level residential units (perhaps as high as 100 living units in Downtown Laramie). There are at least 258 physically separate businesses within the boundaries. There are also 19 parking lots, both public and private, and fewer than 25 vacant spaces (vacant buildings, vacant lots, or upper levels that are currently not in use). To categorize businesses, CBI uses the North American Industry Classification System (NAICS) to identify industry sectors and sub-sectors. As noted in the Baseline Economic Profile on page 7, there are over 3,000 total employees (full-time, part-time and temporary), within a 0.3 mile radius of the intersection of Grand Avenue and 3rd Street.

Consumer Intercept Survey

A separate piece of this analysis included a targeted survey of shoppers to evaluate consumer preferences, buying patterns, and general attitudes about shopping in Downtown Laramie. The goal of the consumer intercept survey is to allow for adaptation to a larger retail leakage analysis. The consumer survey could become even more helpful if it were expanded to include shopping patterns in the entire Laramie community. Surveys were conducted at two of the Weekly Farmer's Markets in Downtown Laramie, at the UW Student Union, and online (through Facebook, website, and table tent promotion). A total of 110 in-person surveys were collected (those administered by CBI representatives), and another 305 surveys were completed online, for 415 total consumer surveys.



Figure 1 Anong's Thai Cuisine and Big Hollow Food Coop - 119 South 1st St.



"Escape" Mural at 2nd and Garfield

Baseline Economic Profile

Nielsen Market Data

For this study, CBI is using data provided by The Nielsen Company (formerly known as Claritas), a private market data analysis company. Nielsen gathers data from many official government sources (such as the U.S. Census Bureau and the U.S. Bureau of Labor Statistics) and combines it with internal information and other data sources to which Nielsen has proprietary access. This unique combination of data streams creates a robust profile of any economy. Unfortunately, CBI is unable to replicate the exact downtown district with Nielsen's reporting system. Instead, CBI has gathered data for all businesses within a small radius (0.3 miles) of the corner of Grand Avenue and Third Street). The downtown area for the Nielsen data is shown on the following map. The Nielsen study area is shown by the red circle, and the downtown district is outlined in light blue.



Source: Base map is from The Nielsen Company, altered by CBI.

Based on the Nielsen data, there are up to 3,277 employees working at downtown businesses, generating \$537.1 in sales in downtown Laramie. It should be noted that the study area (0.3-mile radius) is slightly larger than the downtown district and includes some businesses and employer numbers that are not part of the designated downtown area. The number of employees includes part-time jobs, (so the actual number of worker is lower, since many people have more than one job). These employees, and sales are distributed across many industry sectors, as shown in the table that follows.

NAICS	Downtown Businesses, Employees & Sales, by Sector	Employees	Sales (\$ millions)
11	Agriculture, Forestry, Fishing & Hunting	2	\$2.1
111	Crop Production	0	\$0.0
112	Animal Production & Aquaculture	0	\$0.0
113	Forestry & Logging	0	\$0.0
115	Support Activities for Agriculture & Forestry	2	\$2.1
21	Mining, Quarrying, & Oil & Gas Extraction	0	\$0.0
22	Utilities	3	\$0.8
23	Construction	93	\$22.0
236	Construction of Buildings	20	\$8.0
237	Heavy & Civil Engineering Construction	25	\$6.8
238	Specialty Trade Contractors	48	\$7.2
31-33	Manufacturing	88	\$121.5
311	Food Manufacturing	24	\$22.9
312	Beverage & Tobacco Product Manufacturing	44	\$91.6
314	Textile Product Mills	0	\$0.0
316	Leather & Allied Product Manufacturing	0	\$0.0
321	Wood Product Manufacturing	0	\$0.0
323	Printing & Related Support Activities	16	\$5.1
326	Plastics & Rubber Products Manufacturing	0	\$0.0
327	Nonmetallic Mineral Product Manufacturing	0	\$0.0
332	Fabricated Metal Product Manufacturing	0	\$0.0
333	Machinery Manufacturing	3	\$1.1
337	Furniture & Related Product Manufacturing	0	\$0.0
339	Miscellaneous Manufacturing	1	\$0.8
42	Wholesale Trade	31	\$71.4
423	Merchant Wholesalers, Durable Goods	16	\$37.3
424	Merchant Wholesalers Non Durable Goods	15	\$34.1
425	Wholesale Electronic Markets & Agents & Brokers	0	\$0.0
44-45	Retail Trade	419	\$95.3
441	Motor Vehicle & Parts Dealers	38	\$9.0
442	Furniture & Home Furnishing Stores	30	\$7.5
443	Electronics & Appliance Stores	37	\$10.4
444	Building Material & Garden Equipment & Supplies	40	\$9.8
445	Food & Beverage Stores	26	\$7.1
446	Health & Personal Care Stores	6	\$0.9
447	Gasoline Stations	6	\$4.3
448	Clothing & Accessories Stores	49	\$7.8
451	Sporting Goods, Hobby, Musical Instrument, Book Stores	48	\$8.0
452	General Merchandise Stores	6	\$1.5
453	Miscellaneous Store Retailers	128	\$28.2
454	Non-store Retailers	5	\$0.9
48-49	Transportation & Warehousing	74	\$3.4
481	Air Transportation	0	\$0.0
484	Truck Transportation	5	\$1.0
485	Transit & Ground Passenger Transportation	3	\$0.2
486	Pipeline Transportation	0	\$0.0
487	Scenic & Sightseeing Transportation	0	\$0.0
488	Support Activities for Transportation	21	\$2.2
491	Postal Service	45	\$0.0
493	Warehousing & Storage	0	\$0.0

NAICS	Downtown Businesses, Employees & Sales by Sector	Employees	Sales (\$ millions)
51	Information	146	\$32.8
511	Publishing Industries (Except Internet)	94	\$19.8
512	Motion Picture & Sound Recording Industries	6	\$0.7
515	Broadcasting (Except Internet)	35	\$6.3
517	Telecommunications	9	\$5.7
518	Data Processing, Hosting, & Related Services	0	\$0.0
519	Other Information Services	2	\$0.3
52	Finance & Insurance	161	\$43.5
522	Credit Intermediation & Related Activities	77	\$3.7
523	SEC Commercial Contracts, & Other Financial Activities	42	\$30.1
524	Insurance Carriers & Related Activities	39	\$7.3
525	Funds, Trusts & Other Financial Vehicles	3	\$2.5
53	Real Estate & Rental & Leasing	124	\$26.3
531	Real Estate	111	\$24.4
532	Rental & Leasing Services	13	\$1.9
54	Professional, Scientific, & Technical Services	445	\$52.8
55	Management of Companies & Enterprises	0	\$0.0
56	Admin & Support & Waste Mgmt & Remediation	8	\$1.1
561	Administrative & Support Services	8	\$1.1
562	Waste Management & Remediation Services	0	\$0.0
61	Educational Services	22	\$0.2
62	Healthcare & Social Assistance	240	\$17.5
621	Ambulatory Health Care Services	120	\$14.0
622	Hospitals	0	\$0.0
623	Nursing & Residential Care Facilities	5	\$0.0
624	Social Assistance	115	\$3.5
71	Arts, Entertainment, & Recreation	43	\$2.1
711	Performing Arts, Spectator Sports, & Related Industries	1	\$0.1
712	Museums, Historical Sites, & Similar Institutions	7	\$0.0
713	Amusement, Gambling, & Recreation Industries	35	\$2.0
72	Accommodation & Food Services	377	\$21.0
721	Accommodation	5	\$0.6
722	Food Services & Drinking Places	372	\$20.4
81	Other Services (except Public Administration)	330	\$23.3
811	Repair & Maintenance	100	\$14.8
812	Personal & Laundry Services	125	\$8.6
813	Religious, Grant making, Civic, Professional	105	\$0.0
92	Public Administration	671	\$0.0
ALL	ALL DOWNTOWN SECTORS	3,277	\$537.1

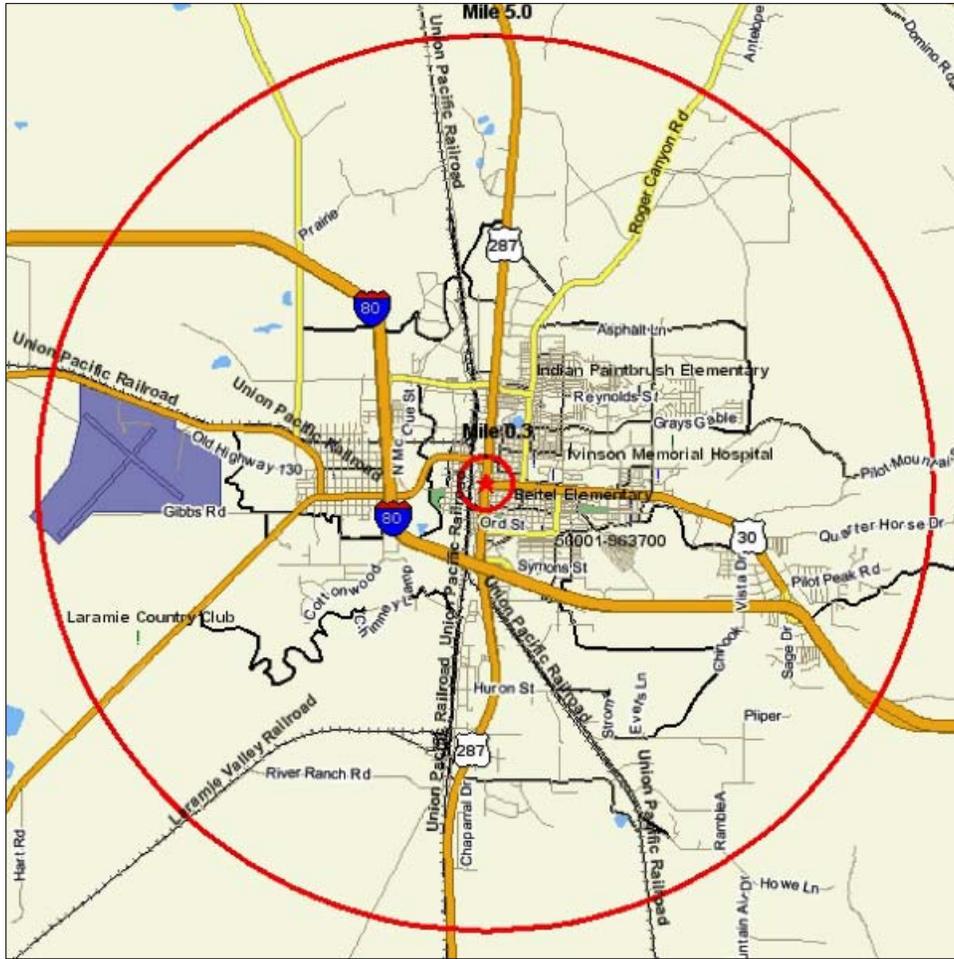
Source: 2014 Data from The Nielsen Company.

The following table lists each industry in the downtown area, with CBI’s physical census of known businesses.

NAICS	Downtown Businesses by Sector	CBI Census
11	Agriculture, Forestry, Fishing & Hunting	1
21	Mining, Quarrying, & Oil & Gas Extraction	0
22	Utilities	1
23	Construction	7
31-33	Manufacturing	7
42	Wholesale Trade	1
44-45	Retail Trade	74
48-49	Transportation & Warehousing	3
51	Information	4
52	Finance & Insurance	4
53	Real Estate & Rental & Leasing	13
54	Professional, Scientific, & Technical Services	31
56	Admin & Support & Waste Mgmt & Remedial Services	2
61	Educational Services	4
62	Healthcare & Social Assistance	21
71	Arts, Entertainment, & Recreation	4
72	Accommodation & Food Services	33
81	Other Services (except Public Administration)	40
92	Public Administration	8
ALL	ALL SECTORS	258

Source: CBI analysis.

To understand the importance of the downtown area in Laramie, CBI also analyzed Nielsen data for the entire Laramie area economy. Data was gathered for all business activity within a 5-mile radius of the corner of Grand Avenue and Third Street. This area is shown in the following map by the large redlined circle, while the downtown study area is shown by the smaller circle in the center of the map (showing the 0.3-mile radius from the same intersection).



Source: Base map of study areas is from The Nielsen Company, altered by CBI.

The 2014 Nielsen data shows that the Laramie area economy supports 20,137 jobs and generates \$2.83 billion in sales (with the same caveats explained above for the Nielsen data about the downtown economy). The downtown area includes 16.3% of these jobs and 19% of all sales in the Laramie area. One reason that the downtown area represents only 19% of sales is that big box stores (such as Wal-Mart) generates high volume sales. Also, total sales include vehicle sales and other high dollar items that are not currently sold downtown.

An earlier survey conducted by the University of Wyoming Geography Professor Bill Gribb, former Design Committee Chair, indicated that there may be 95 total residential units.

Nielsen Business Data		Laramie (5-mile radius)		Downtown (0.3-mile)	
NAICS	Industry	Employees	Sales (\$ millions)	% Employees	% Sales
11	Agriculture, Forestry, Fishing & Hunting	613	\$4.4	0.3%	47.7%
111	Crop Production	12	\$0.7	0.0%	0.0%
112	Animal Production & Aquaculture	6	\$0.3	0.0%	0.0%
113	Forestry & Logging	3	\$0.6	0.0%	0.0%
115	Support Activities for Agriculture & Forestry	592	\$2.8	0.3%	75.0%
21	Mining, Quarrying, & Oil & Gas Extraction	10	\$1.8	0.0%	0.0%
22	Utilities	14	\$8.3	21.4%	9.6%
23	Construction	863	\$199.5	10.8%	11.0%
236	Construction of Buildings	286	\$111.5	7.0%	7.2%
237	Heavy & Civil Engineering Construction	157	\$26.3	15.9%	25.9%
238	Specialty Trade Contractors	420	\$61.7	11.4%	11.7%
31-33	Manufacturing	300	\$252.6	29.3%	48.1%
311	Food Manufacturing	73	\$78.2	32.9%	29.3%
312	Beverage & Tobacco Product Manufacturing	50	\$104.1	88.0%	88.0%
314	Textile Product Mills	1	\$0.6	0.0%	0.0%
316	Leather & Allied Product Manufacturing	1	\$0.2	0.0%	0.0%
321	Wood Product Manufacturing	11	\$7.8	0.0%	0.0%
323	Printing & Related Support Activities	49	\$15.2	32.7%	33.6%
326	Plastics & Rubber Products Manufacturing	6	\$3.3	0.0%	0.0%
327	Nonmetallic Mineral Product Manufacturing	22	\$9.7	0.0%	0.0%
332	Fabricated Metal Product Manufacturing	30	\$13.8	0.0%	0.0%
333	Machinery Manufacturing	5	\$1.9	60.0%	57.9%
337	Furniture & Related Product Manufacturing	21	\$5.6	0.0%	0.0%
339	Miscellaneous Manufacturing	31	\$12.1	3.2%	6.6%
42	Wholesale Trade	387	\$608.8	8.0%	11.7%
423	Merchant Wholesalers, Durable Goods	282	\$355.7	5.7%	10.5%
424	Merchant Wholesalers Non Durable Goods	96	\$228.7	15.6%	14.9%
425	Wholesale Electronic Markets & Agents & Brokers	9	\$24.5	0.0%	0.0%
44-45	Retail Trade	2,100	\$690.2	20.0%	13.8%
441	Motor Vehicle & Parts Dealers	348	\$175.9	10.9%	5.1%
442	Furniture & Home Furnishing Stores	54	\$13.7	55.6%	54.7%
443	Electronics & Appliance Stores	60	\$16.8	61.7%	61.9%
444	Building Material & Garden Equipment & Supplies	166	\$51.3	24.1%	19.1%
445	Food & Beverage Stores	391	\$110.9	6.6%	6.4%
446	Health & Personal Care Stores	75	\$20.0	8.0%	4.5%
447	Gasoline Stations	155	\$110.4	3.9%	3.9%
448	Clothing & Accessories Stores	62	\$9.4	79.0%	83.0%
451	Sporting Goods, Hobby, Musical Instrument, Book Stores	121	\$20.2	39.7%	39.6%
452	General Merchandise Stores	461	\$112.4	1.3%	1.3%
453	Miscellaneous Store Retailers	190	\$41.6	67.4%	67.8%
454	Non-store Retailers	17	\$7.8	29.4%	11.5%
48-49	Transportation & Warehousing	179	\$25.4	41.3%	13.4%
481	Air Transportation	6	\$2.4	0.0%	0.0%
484	Truck Transportation	47	\$9.4	10.6%	10.6%
485	Transit & Ground Passenger Transportation	7	\$0.5	42.9%	40.0%
486	Pipeline Transportation	10	\$8.1	0.0%	0.0%
487	Scenic & Sightseeing Transportation	12	\$0.7	0.0%	0.0%
488	Support Activities for Transportation	45	\$4.1	46.7%	53.7%
491	Postal Service	47	\$0.0	95.7%	0.0%
493	Warehousing & Storage	5	\$0.2	0.0%	0.0%

Nielsen Business Data		Laramie (5-mile radius)		Downtown (0.3-mile)	
NAICS	Industry	Employees	NAICS	Industry	Employees
51	Information	532	\$77.6	27.4%	42.3%
511	Publishing Industries (Except Internet)	105	\$22.2	89.5%	89.2%
512	Motion Picture & Sound Recording Industries	14	\$1.5	42.9%	46.7%
515	Broadcasting (Except Internet)	131	\$19.6	26.7%	32.1%
517	Telecommunications	33	\$22.0	27.3%	25.9%
518	Data Processing, Hosting, & Related Services	16	\$3.2	0.0%	0.0%
519	Other Information Services	233	\$9.0	0.9%	3.3%
52	Finance & Insurance	591	\$136.9	27.2%	31.8%
522	Credit Intermediation & Related Activities	275	\$55.6	28.0%	6.7%
523	SEC Commercial Contracts & Other Financial Activities	76	\$53.7	55.3%	56.1%
524	Insurance Carriers & Related Activities	237	\$25.1	16.5%	29.1%
525	Funds, Trusts & Other Financial Vehicles	3	\$2.5	100.0%	100.0%
53	Real Estate & Rental & Leasing	386	\$86.2	32.1%	30.5%
531	Real Estate	325	\$70.6	34.2%	34.6%
532	Rental & Leasing Services	61	\$15.6	21.3%	12.2%
54	Professional, Scientific, & Technical Services	1,480	\$184.7	30.1%	28.6%
55	Management of Companies & Enterprises	3	\$0.0	0.0%	0.0%
56	Admin & Support & Waste Mgmt & Remedial Services	347	\$41.9	2.3%	2.6%
561	Administrative & Support Services	344	\$41.2	2.3%	2.7%
562	Waste Management & Remediation Services	3	\$0.7	0.0%	0.0%
61	Educational Services	4,387	\$0.8	0.5%	25.0%
62	Healthcare & Social Assistance	2,830	\$265.8	8.5%	6.6%
621	Ambulatory Health Care Services	1,368	\$184.8	8.8%	7.6%
622	Hospitals	548	\$67.0	0.0%	0.0%
623	Nursing & Residential Care Facilities	277	\$1.0	1.8%	0.0%
624	Social Assistance	637	\$13.0	18.1%	26.9%
71	Arts, Entertainment, & Recreation	381	\$35.0	11.3%	6.0%
711	Performing Arts, Spectator Sports, & Related Industries	109	\$26.5	0.9%	0.4%
712	Museums, Historical Sites, & Similar Institutions	127	\$1.5	5.5%	0.0%
713	Amusement, Gambling, & Recreation Industries	145	\$7.0	24.1%	28.6%
72	Accommodation & Food Services	2,157	\$150.2	17.5%	14.0%
721	Accommodation	591	\$64.4	0.8%	0.9%
722	Food Services & Drinking Places	1,566	\$85.8	23.8%	23.8%
81	Other Services (except Public Administration)	1,202	\$59.9	27.5%	38.9%
811	Repair & Maintenance	324	\$41.5	30.9%	35.7%
812	Personal & Laundry Services	254	\$16.3	49.2%	52.8%
813	Religious, Grant making, Civic, Professional	624	\$2.2	16.8%	0.0%
92	Public Administration	1,375	\$0.0	48.8%	0.0%
ALL	ALL LARAMIE AREA SECTORS	20,137	\$2,830.0	16.3%	19.0%

Source: CBI analysis based on 2014 data from The Nielsen Company.

As one might expect, certain industry sectors are much stronger downtown than in other places. These strengths tend to be the smaller retail stores and service providers. Although manufacturing does well downtown, the retail and service sectors represent nearly 48% of all jobs in Laramie, and nearly 36% of all sales. Accordingly, those two major sectors warrant a deeper look.

Within the retail sector, 65% of the jobs and 59% of total sales are within six (6) sub-sectors, listed below.

NAICS	Largest Downtown Retail Sub-Sectors	Employees	Sales (\$ millions)
441310	Automotive Parts & Accessories Stores	26	\$5.0
442110	Furniture Stores	25	\$6.6
443142	Electronics Stores	33	\$9.1
444130	Hardware Stores	25	\$4.5
444190	Other Building Material Dealers	15	\$5.2
453210	Office Supplies & Stationery Stores	80	\$21.0
722511	Full-Service Restaurants	310	\$16.9

Source: 2014 Data from The Nielsen Company.

Similarly, 58% of workers and 79% of sales in the downtown service industry are included in just six (6) sub-sectors, as shown in the following table.

NAICS	Largest Downtown Service Sub-Sectors	Employees	Sales (\$ millions)
541110	Offices of Lawyers	204	\$18.4
5413	Architectural, Engineering, & Related Services	54	\$9.4
5418	Advertising, Public Relations, & Related Services	59	\$15.5
811118	Other Automotive Mechanical, Electrical Repair, Maint.	49	\$6.2
811212	Computer & Office Machine Repair & Maintenance	40	\$7.1
812331	Linen Supply	45	\$4.1

Source: 2014 Data from The Nielsen Company.

The twelve sub-sectors identified above represent the core of the downtown economy. Accordingly, efforts should be made to support them and help them grow. Other sub-sectors could become the focus of entrepreneurship and recruitment efforts, but one of the best proven economic development strategies is to help existing businesses grow. That effort should begin with these twelve industries.



210 South 3rd Street

Employment Analysis

Another key dimension of the local economy is employment. Although the Nielsen estimates are helpful for understanding a general location, a more exact method for analysis of jobs and wages is available. For this analysis, CBI is using data from the Quarterly Census of Employment and Wages (QCEW), which is information compiled by the State of Wyoming from actual employer reports filed for payment of unemployment insurance. A very large percentage of employees in Albany County (more than 90%) are covered by unemployment insurance, and so QCEW data is especially helpful to understanding the local economy. QCEW data is also available at the state and national level, enabling industry sector comparisons and establishing trends.

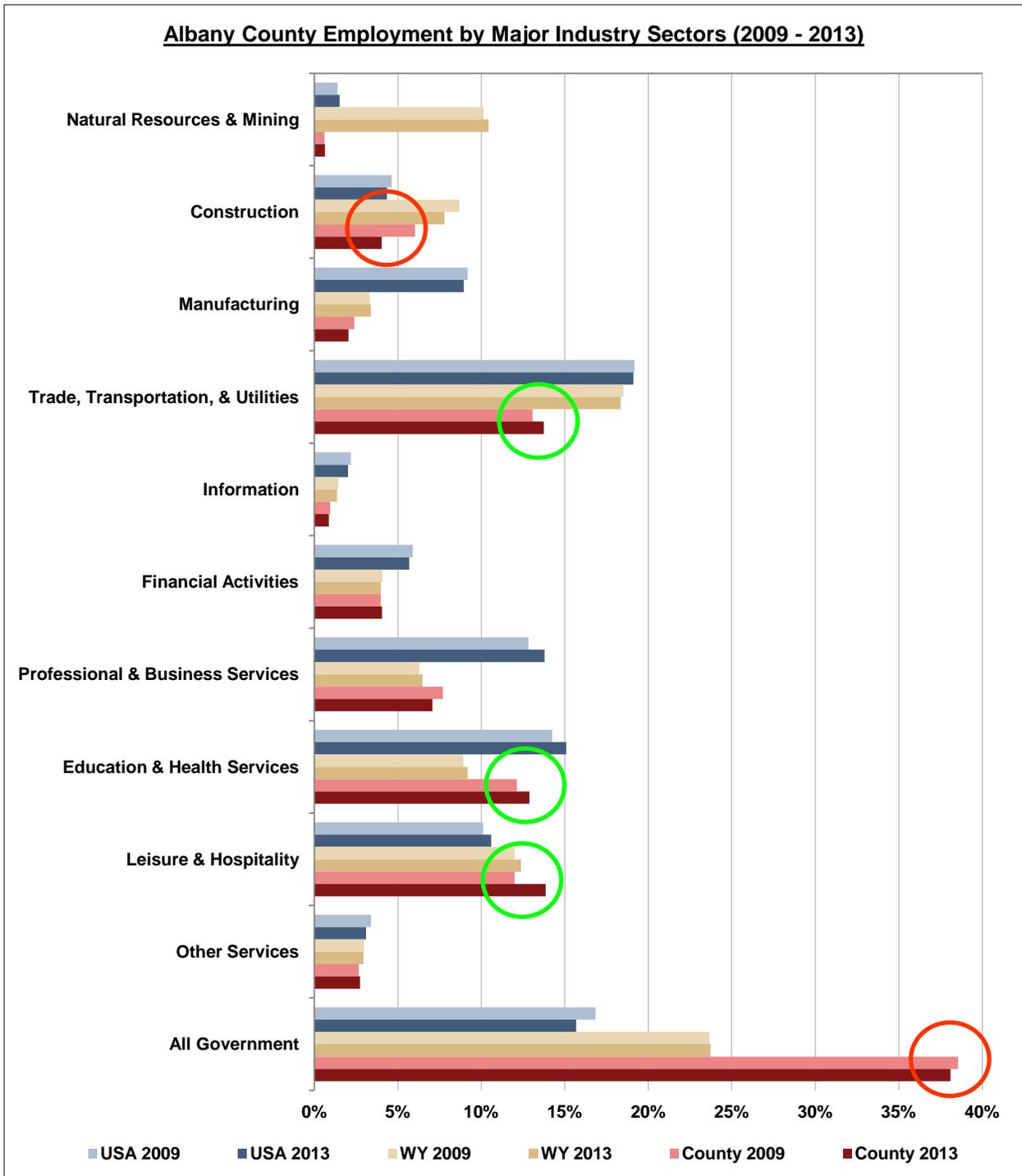
Examination of the employment markets for Albany County (“County” in the following charts), Wyoming (WY), and the nation (USA) reveals that there are several broad sectors that are doing well in Albany County (compared to the state and nation), including:

- Trade, Transportation, and Utilities
- Education and Health Services
- Leisure and Hospitality

Additionally, this analysis reveals that the Construction industry is shrinking significantly, and that Government employment is very high.

These trends are highlighted in the following chart.

Albany County Employment by Major Industry Sectors (2009 - 2013)



Source: Chart based on QCEW data from U.S. Bureau of Labor Statistics.

Deeper analysis of industry sectors and sub-sectors is warranted for the strengths and weaknesses of employment in Albany County. For example, CBI has identified that the

following sub-sectors are responsible for the growth during the last five years in the Trade, Transportation, and Utilities industries:

- Merchant wholesales of nondurable goods (added 27 jobs, 38.7% growth)
- Electronics & appliance stores (added 27 jobs, 79.0% growth)
- Building material & garden supply stores (added 31 jobs, 32.5% growth)
- Gas stations (added 29 jobs, 11.2% growth)
- Truck transportation (added 15 jobs, 21.5% growth)
- Support activities for transportation (added 10 jobs, 46.1% growth)

Similarly, with Education and Health Services, the industries that are growing the fastest are:

- Ambulatory health care services (added 28 jobs, 4.4% growth)
- Social assistance (added 43 jobs, 6.9% growth)

By far, the industry that is growing the fastest is food services and drinking places (277 jobs, 21.7% growth). All of these growth industries are expected to continue growing, in large part because of retail leakage in those industries (discussed in the Retail Leakage section). As growth opportunities, Laramie should devote considerable effort to helping support existing businesses expand.

Examination of wage growth from 2009 to 2013 is also helpful. Several sectors have average annual wages that have grown significantly in the last five years, including:

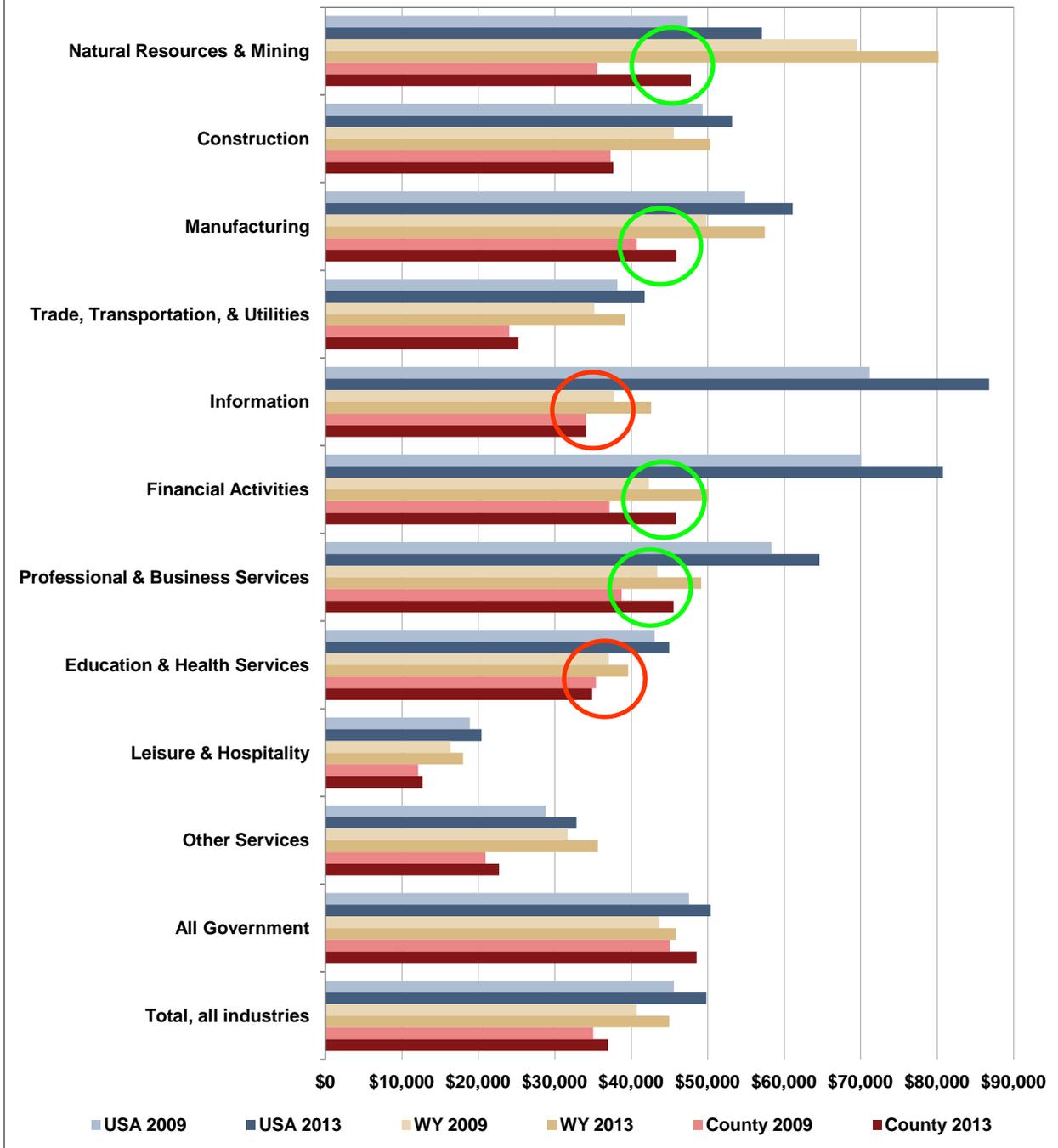
- Natural resources and mining
- Manufacturing
- Financial activities
- Professional and business services

There are also sectors that have experienced declining wages:

- Information
- Education and Health Services

These trends and comparisons to the state and national industries can be found in the following chart.

Albany County Average Annual Wages by Major Industry (2009 - 2013)



Source: Chart based on QCEW data from U.S. Bureau of Labor Statistics.

Once again, it is helpful to analyze industry sub-sectors that have experienced significant wage change in the last five years. For example, several manufacturing sub-sectors are doing very well, including:

- Food manufacturing
- Beverage and tobacco product manufacturing
- Wood product manufacturing
- Chemical manufacturing
- Nonmetallic mineral product manufacturing
- Fabricated metal product manufacturing
- Machinery manufacturing
- Computer and electronic product manufacturing
- Transportation equipment manufacturing

Other manufacturing sectors are not doing so well (printing and related support, and furniture and related products, have lower annual wages). However, average annual wages in manufacturing have risen from \$40,754 in 2009 to \$45,903 in 2013 (12.6% growth). Because of this wage growth, and because manufacturing is a primary sector that brings new money into the local economy, it should remain a priority for Laramie’s economic development strategies.

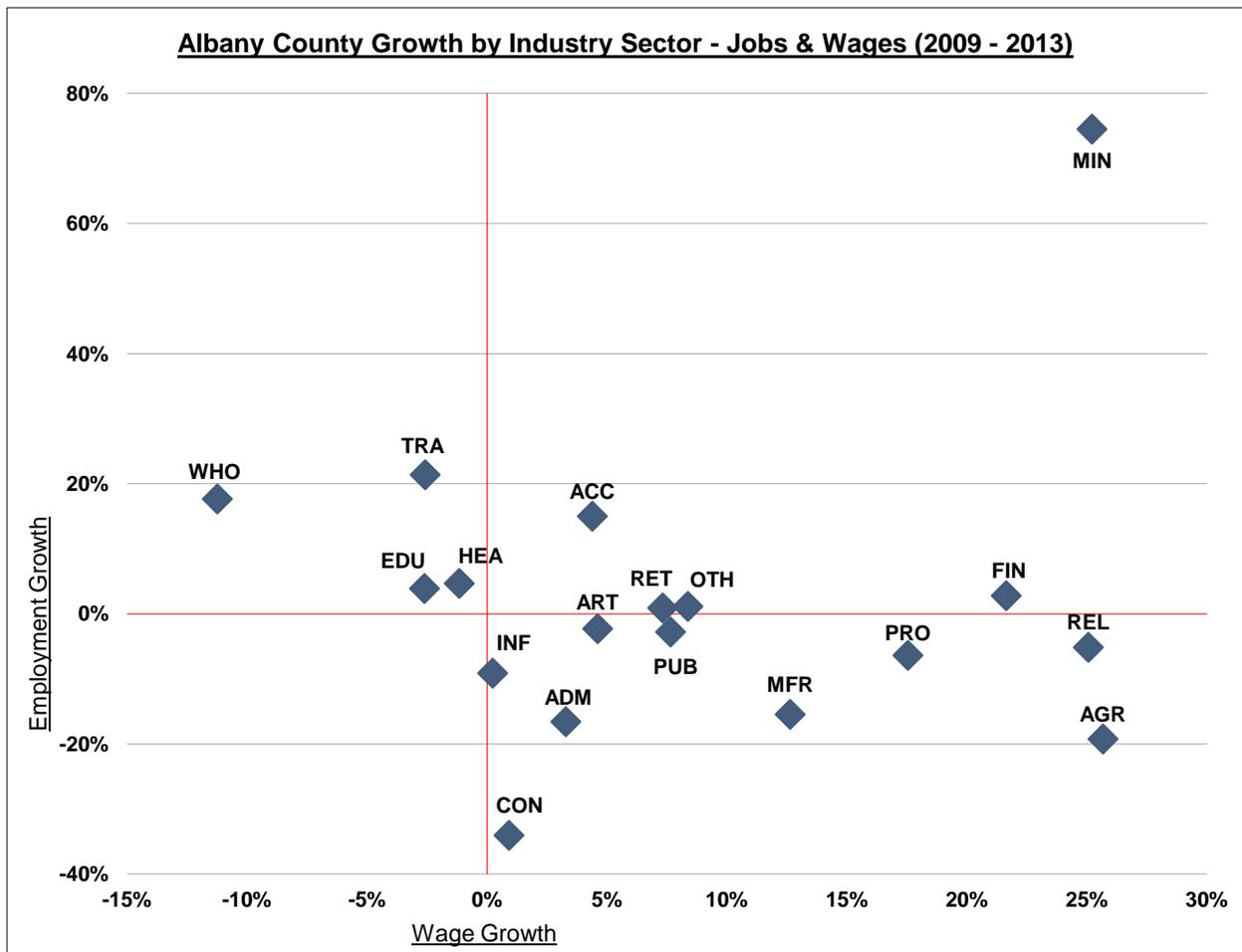
While the Information sector is otherwise stagnant, the motion picture and sound recording industry has enjoyed 23.5% growth in wages. Within the Financial Activities sector, Credit Intermediation and Insurance carriers have wage growth of 21.7% and 19.9%, respectively. The Finance and Insurance industries pay very well (\$47,167 and \$61,204, respectively), and they therefore should be targets for economic growth.

Wages are dropping in nearly all Educational Services, Health Care and Social Assistance sectors – with one exception: Nursing and residential care facilities have enjoyed 3.8% wage growth in the last five years. Further analysis of the Education and Health Care sectors should be undertaken in an industry-specific study (beyond the scope of this study), to determine the causes and solutions for decreasing wages.

To summarize the growth of the job base and average annual wages, and to allow quick visual analysis, the following chart compares each industry’s growth of jobs and wages. The chart is divided into four quadrants:

- Upper right (industries with growth in jobs and growth in wages)
- Lower right (industries with growth in wages but not jobs)
- Upper left (industries with growth in jobs but not in wages)
- Lower left ((industries without growth in jobs or wages)

The following scatter chart illustrates growth by percentage of change in the last five years.



Of course, some of these industries would be inappropriate for development in Downtown Laramie (e.g., Mining and Agriculture). However, there are several growth industries that could become specific targets for future growth downtown:

- Accommodations
- Retail
- Other Services
- Finance

These industries are enjoying growth in the number of jobs and wages, trends that should be supported with economic development efforts (such as training/education, planning, marketing, and collaboration).

Retail Analysis

The retail sector (i.e., businesses that sell directly to consumers) is a critical part of every local economy. Another way to analyze the retail sector is to examine detailed excise tax data. Excise taxes are the lifeblood of revenue for Wyoming's municipalities.

Excise tax distributions are the amount of sales and use taxes distributed by the State of Wyoming back to local governments (municipalities and counties) in the county where the taxes were collected. Distributions within each county are based on the population. Because excise taxes are collected by all industries (not just retail), they can also be a good indicator of the health of the local economy.

For this report, CBI is using the following abbreviations to refer to the major industry sectors in Albany County:

AGR:	Agriculture, Forestry, Fishing, and Hunting
MIN:	Mining, Quarrying, and Oil and Gas Extraction
UTL:	Utilities
CON:	Construction
MFR:	Manufacturing
WHO:	Wholesale Trade
RET:	Retail Trade
TRA:	Transportation and Warehousing
INF:	Information
FIN:	Finance and Insurance
REL:	Real Estate, Rental and Leasing
PRO:	Professional, Scientific, and Technical Services
MGT:	Management of Companies and Enterprises
ADM:	Administrative and Support and Waste Management and Remediation Services
EDU:	Educational Services
HEA:	Health Care and Social Assistance
ART:	Arts, Entertainment, and Recreation
ACC:	Accommodation and Food Services
OTH:	Other Services (except Public Administration)
PUB:	Public Administration

Additionally, CBI refers to industry sectors and subsectors by the numeric code assigned by the North American Industry Classification System (NAICS). With NAICS, the more the digits in the code the more detailed the industry sub-sector will be. For example, the major industry sectors identified above have 2-digit codes, while detailed sub-sectors have more digits.

While some counties and municipalities charge lodging taxes and optional sales tax, the State of Wyoming charges a 4% excise tax for all taxable exchanges. By analyzing just that portion of

total excise taxes, one can consistently determine the size of the taxable market for each industry. The following table shows Albany County’s \$500+ million sales market, by major industry sector. By far, it is clear that the Retail (RET) sector generates the most sales (\$221 million), especially when considering that the Public sector’s “sales” are mostly the collection of sales tax for motor vehicles (part of the retail market). Together, those two sectors represent more than 55% of the taxable market for Albany County. Accommodations (ACC) – which consists of restaurants and lodging – represents another 15% of the taxable market. All other sectors combined are less than 30% of the taxable market, as shown below.

Albany County Excise Taxes and Market (Sales), by Sector (FY 2014)				
NAICS	Sector	4% Excise Tax	Market Size (Sales)	% of Market
11	AGR	\$29,971	\$749,275	0.1%
21	MIN	\$238,082	\$5,952,050	1.2%
22	UTL	\$1,067,194	\$26,679,850	5.2%
23	CON	\$703,533	\$17,588,325	3.5%
31-33	MFR	\$356,725	\$8,918,125	1.8%
42	WHO	\$895,729	\$22,393,225	4.4%
44-45	RET	\$8,864,213	\$221,605,325	43.5%
48-49	TRA	\$179,235	\$4,480,875	0.9%
51	INF	\$593,921	\$14,848,025	2.9%
52	FIN	\$15,789	\$394,725	0.1%
53	REL	\$469,003	\$11,725,075	2.3%
54	PRO	\$81,603	\$2,040,075	0.4%
56	ADM	\$316,857	\$7,921,425	1.6%
61	EDU	\$319,844	\$7,996,100	1.6%
62	HEA	\$2,478	\$61,950	0.0%
71	ART	\$31,758	\$793,950	0.2%
72	ACC	\$3,150,033	\$78,750,825	15.5%
81	OTH	\$674,125	\$16,853,125	3.3%
92	PUB	\$2,385,048	\$59,626,200	11.7%
ALL	TOTAL	\$20,375,141	\$509,378,525	100.0%

Source: CBI analysis based on data from Wyoming Department of Revenue.

The industry sub-sector that includes the so-called “big box” stores (NAICS 4529, Other General Merchandise Stores) generated more than \$63 million in sales in Fiscal Year 2014 (July 2013 to June 2014) in Albany County. In addition, there are 12 other industry sub-sectors that each generated more than \$10 million in sales (collectively, \$325 million in sales, which represents 63.9% of all taxable sales and exchanges in Albany County). Those industry sub-sectors are listed in the following table.

Albany County - Top Industry Sub-Sectors, by Market Size (FY 2014)	
NAICS Code - Industry Sub-Sector	Taxable Exchanges
4529-Other General Merchandise Stores	\$63,542,175
9211-Executive, Legislative And General Government	\$59,593,050
7221-Full-Service Restaurants	\$28,516,875
4441-Building Material And Supplies Dealers	\$26,992,800
2211-Power Generation And Supply	\$26,307,725
7222-Limited-Service Eating Places	\$25,800,450
4471-Gasoline Stations	\$18,149,550
7211-Traveler Accommodation	\$16,574,875
4431-Electronics And Appliance Stores	\$13,674,100
4413-Auto Parts, Accessories, And Tire Stores	\$13,074,850
4451-Grocery Stores	\$12,022,175
8111-Automotive Repair And Maintenance	\$10,850,425
5173-Telecommunications Resellers	\$10,151,325

Source: Data from Wyoming Department of Revenue.

Another 42 industry sub-sectors are each generating between \$1 million and \$10 million in sales (more than \$159 million in sales, or about 31.4% of all taxable sales in Albany County). These sub-sectors add diversity; all are listed in the table below.

Albany County - Industry Sub-Sectors with sales of \$1 - \$10 million (FY 2014)	
NAICS Code - Industry Sub-Sector	Taxable Exchanges
2362-Nonresidential Building Construction	\$9,095,025
6113-Colleges And Universities	\$7,947,100
4453-Beer, Wine, And Liquor Stores	\$7,714,600
5615-Travel Arrangement And Reservation Services	\$7,086,700
4539-Other Miscellaneous Store Retailers	\$6,922,100
4412-Other Motor Vehicle Dealers	\$6,905,250
7224-Drinking Places, Alcoholic Beverages	\$6,872,375
4532-Office Supplies, Stationery, And Gift Stores	\$6,665,100
4411-Automobile Dealers	\$6,227,100
4521-Department Stores	\$6,195,350
2131-Support Activities For Mining	\$5,650,425
4481-Clothing Stores	\$5,540,875
5324-Machinery And Equipment Rental And Leasing	\$4,363,700
4236-Electric Goods Merchant Wholesalers	\$4,360,975
4512-Book, Periodical, And Music Stores	\$4,227,300
3273-Cement And Concrete Product Manufacturing	\$4,131,275
4821-Rail Transportation	\$3,928,100
4246-Chemical Merchant Wholesalers	\$3,716,500
5321-Automotive Equipment Rental And Leasing	\$3,584,575
4421-Furniture Stores	\$3,393,475
4422-Home Furnishings Stores	\$3,098,200
4237-Hardware And Plumbing Merchant Wholesalers	\$3,089,775
4461-Health And Personal Care Stores	\$3,053,150
4511-Sporting Goods And Musical Instrument Stores	\$2,855,375
4234-Commercial Equip. Merchant Wholesalers	\$2,815,100
2382-Building Equipment Contractors	\$2,595,025
2389-Other Specialty Trade Contractors	\$2,554,375
4541-Electronic Shopping And Mail Order Houses	\$2,405,075
4238-Machinery And Supply Merchant Wholesalers	\$2,386,325
4442-Lawn And Garden Equipment And Supplies Stores	\$2,259,175
5322-Consumer Goods Rental	\$2,177,450
4543-Direct Selling Establishments	\$1,868,550
8113-Commercial Machinery Repair And Maintenance	\$1,705,225
4533-Used Merchandise Stores	\$1,650,600
2361-Residential Building Construction	\$1,640,500
8114-Household Goods Repair And Maintenance	\$1,582,325
5323-General Rental Centers	\$1,579,950
8123-Drycleaning And Laundry Services	\$1,531,250
4482-Shoe Stores	\$1,175,325
5121-Motion Picture And Video Industries	\$1,076,950
4233-Lumber And Const. Supply Merchant Wholesalers	\$1,042,650
5419-Other Professional And Technical Services	\$1,021,575

Source: Data from Wyoming Department of Revenue.

Along with the top industries identified earlier (i.e., those with sales of \$10+ million), 95.2% of all sales are generated by the 55 industries with sales of more than \$1 million. Thus, there is much room for improvement of economic diversity, since there are a total of 218 sub-sectors (4-digit NAICS) with sales in Albany County.

Examination of recent market trends identifies which industry sub-sectors are growing and which are not. This analysis can help identify good targets for growth, as well as identify some businesses that are struggling and need help. In the last five years (Fiscal Year 2009 to 2014), 16 industry subsectors gained \$1 million or more in sales, as listed in the following table.

Albany County Exchanges Subject to Excise Taxes (FY 2009-2014) By Minor Industry Sector	Exchanges Subject to Excise Taxes		
	FY2009	FY2014	Change
9211-Executive, Legislative And General Government	\$48,302,225	\$59,593,050	\$11,290,825
7222-Limited-Service Eating Places	\$19,178,200	\$25,800,450	\$6,622,250
2211-Power Generation And Supply	\$19,690,525	\$26,307,725	\$6,617,200
5173-Telecommunications Resellers	\$5,602,200	\$10,151,325	\$4,549,125
4471-Gasoline Stations	\$14,133,925	\$18,149,550	\$4,015,625
2131-Support Activities For Mining	\$2,147,175	\$5,650,425	\$3,503,250
7221-Full-Service Restaurants	\$25,664,300	\$28,516,875	\$2,852,575
4413-Auto Parts, Accessories, And Tire Stores	\$10,285,225	\$13,074,850	\$2,789,625
4246-Chemical Merchant Wholesalers	\$1,824,550	\$3,716,500	\$1,891,950
4539-Other Miscellaneous Store Retailers	\$5,110,575	\$6,922,100	\$1,811,525
4237-Hardware And Plumbing Merchant Wholesalers	\$1,333,400	\$3,089,775	\$1,756,375
4442-Lawn And Garden Equipment And Supplies Stores	\$519,950	\$2,259,175	\$1,739,225
4529-Other General Merchandise Stores	\$62,004,025	\$63,542,175	\$1,538,150
8111-Automotive Repair And Maintenance	\$9,714,750	\$10,850,425	\$1,135,675
2389-Other Specialty Trade Contractors	\$1,435,525	\$2,554,375	\$1,118,850
2361-Residential Building Construction	\$530,775	\$1,640,500	\$1,109,725

Source: Data from Wyoming Department of Revenue.

Some of these growing industries are appropriate for further development in Downtown Laramie, including restaurants/eating places, telecommunications resellers, gasoline stations, auto parts, hardware stores, lawn and garden stores, and auto repair. Others are best left for further development in other areas of Laramie and/or Albany County.

There are also several fast-growing industries (albeit smaller) that suggest that an economic development strategy that supports entrepreneurs and small businesses may help build future markets. There are many sub-sectors that have doubled in size (or more) in the last five years, at least 16 of which are appropriate for more growth in downtown Laramie. These industries are listed in the following table.

Albany County Exchanges Subject to Excise Taxes (FY 2009-2014) By Minor Industry Sector	Exchanges Subject to Excise Taxes			
	FY2009	FY2014	Change	Change
1153-Support Activities For Forestry	\$775	\$238,675	\$237,900	30697%
5191-Other Information Services	\$350	\$49,850	\$49,500	14143%
6117-Educational Support Services	\$50	\$6,850	\$6,800	13600%
5413-Architectural And Engineering Services	\$2,550	\$70,450	\$67,900	2663%
5613-Employment Services	\$150	\$3,950	\$3,800	2533%
4853-Taxi And Limousine Service	\$350	\$8,925	\$8,575	2450%
6116-Other Schools And Instruction	\$4,300	\$34,075	\$29,775	692%
7113-Promoters Of Performing Arts And Sports	\$41,475	\$176,225	\$134,750	325%
5223-Activities Related To Credit Intermediation	\$22,500	\$81,925	\$59,425	264%
5182-Data Processing And Related Services	\$33,450	\$80,200	\$46,750	140%
5179-Other Telecommunications	\$281,825	\$615,350	\$333,525	118%
5174-Satellite Telecommunications	\$169,950	\$370,475	\$200,525	118%
5171-Wired Telecommunications Carriers	\$415,775	\$876,500	\$460,725	111%
7131-Amusement Parks And Arcades	\$0	\$16,900	\$16,900	100%
5417-Scientific Research And Development Services	\$0	\$11,925	\$11,925	100%
4251-Electronic Markets And Agents And Brokers	\$0	\$2,950	\$2,950	100%

Source: Data from Wyoming Department of Revenue.

Of course, analysis of excise taxes also identifies some negative trends. There are several sub-sectors that experienced significant declines in sales during the last five years. Fourteen sub-sectors have lost more than \$1 million in annual sales, comparing 2014 to 2009, as listed below.

Albany County Exchanges Subject to Excise Taxes (FY 2009-2014) By Minor Industry Sector	Exchanges Subject to Excise Taxes		
	FY2009	FY2014	Change
4431-Electronics And Appliance Stores	\$22,955,275	\$13,674,100	(\$9,281,175)
4441-Building Material And Supplies Dealers	\$29,648,350	\$26,992,800	(\$2,655,550)
4521-Department Stores	\$8,600,550	\$6,195,350	(\$2,405,200)
4422-Home Furnishings Stores	\$5,227,475	\$3,098,200	(\$2,129,275)
3273-Cement And Concrete Product Manufacturing	\$6,102,850	\$4,131,275	(\$1,971,575)
2362-Nonresidential Building Construction	\$10,880,850	\$9,095,025	(\$1,785,825)
5121-Motion Picture And Video Industries	\$2,820,650	\$1,076,950	(\$1,743,700)
2371-Utility System Construction	\$1,670,875	\$144,700	(\$1,526,175)
2381-Building Foundation And Exterior Contractors	\$2,300,200	\$828,800	(\$1,471,400)
4233-Lumber And Const. Supply Merchant Wholesalers	\$2,436,950	\$1,042,650	(\$1,394,300)
3231-Printing And Related Support Activities	\$2,005,525	\$789,750	(\$1,215,775)
4421-Furniture Stores	\$4,462,750	\$3,393,475	(\$1,069,275)
4238-Machinery And Supply Merchant Wholesalers	\$3,399,600	\$2,386,325	(\$1,013,275)
4541-Electronic Shopping And Mail order Houses	\$3,417,900	\$2,405,075	(\$1,012,825)

Source: Data from Wyoming Department of Revenue.

Based on the types of stores that have lost significant market sales, it appears that competition from big box stores outside of Albany County may be severely cutting into the local market. Additionally, even the non-store sectors (electronic shopping and mail order) are in decline, in spite of the national trend of strong Internet-based sales. Analysis of market demand and supply (retail leakage analysis) for Laramie can shed some insight on the issue, below.

Retail Leakage Analysis

A big factor in excise taxes and sales is consumer spending. Local residents spend disposable income to purchase goods and services according to a variety of considerations, including price, selection, customer service, etc. Regardless of where they make purchases, consumer demand can be calculated by examining local income and needs. Likewise, actual sales (supply) can be determined by analyzing sales tax collections and banking information.

Nielsen estimates consumer demand (retail potential) by calculating the expected amount of money to be spent by consumers, and then comparing it to actual local sales. Consumer demand can be estimated with data of local incomes and traditional spending patterns. When there is more demand (potential) than there is supply (sales), there is retail leakage. Conversely, when sales exceed the expected demand, then the local market is drawing customers from outside the local area (retail surplus).

Nielsen's data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census Bureau. Additional data sources are incorporated to create both supply and demand estimates. Nielsen updates this data annually (in September), and CBI downloaded the data on October 27, 2014.

For purposes of this analysis, the entire Laramie market area is defined as the demand base (Note: Normally, a retail leakage analysis uses the same market definition for both demand and supply, but that does not work well for a downtown area with minimal residents). Thus, the initial retail leakage analysis examines all expenditures and sales in the Laramie area. Subsequently, this report considers the downtown's impact on the broader market.

Based on analysis of Nielsen's data, there are several key retail industries that are generating more sales than the local market demand. This means that those industries have a retail surplus – they are attracting consumers from outside the Laramie area. Some industries are typically found to be very strong in communities that are located on a major highway or near a tourist destination, including gas stations, restaurants, auto parts, liquor, and lodging. For example, the gas stations in the Laramie area had \$180 million in sales this past year, which is \$113 million more in sales than the local population would generate. However, not all travel and tourism-related businesses are doing so well in the Laramie area.

Demand and supply for retail sales in several sectors has been calculated and is presented in the following table.

Laramie Area Retail Expenditures, Sales, and Surplus/Gap, by Retail Sector	Laramie Area Expenditures (Demand)	Laramie Area Actual Sales (Supply)	Laramie Area Surplus (Gap)
Gasoline Stations	\$67,621,144	\$180,749,125	\$113,127,981
Food & Beverage Stores	\$77,255,380	\$182,126,146	\$104,870,766
Motor Vehicle & Parts Dealers	\$148,525,359	\$209,635,027	\$61,109,668
Building Material, Garden Equip Stores	\$65,077,464	\$78,746,131	\$13,668,667
Health & Personal Care Stores	\$25,211,427	\$35,440,064	\$10,228,637
Furniture & Home Furnishings Stores	\$12,502,310	\$9,118,936	(\$3,383,374)
Miscellaneous Store Retailers	\$18,719,773	\$13,950,798	(\$4,768,975)
Electronics & Appliance Stores	\$14,188,677	\$8,327,356	(\$5,861,321)
Eating & Drinking Places	\$70,249,213	\$58,208,195	(\$12,041,018)
Sporting Goods, Hobby, Book & Music Stores	\$15,606,339	\$3,017,293	(\$12,589,046)
Clothing & Accessories Stores	\$30,998,041	\$8,940,454	(\$22,057,587)
General Merchandise Stores	\$73,269,238	\$40,718,359	(\$32,550,879)
Non-Store Retailers	\$54,811,549	\$2,006,539	(\$52,805,010)
Total	\$674,035,914	\$830,984,423	\$156,948,509

Source: 2014 Data from The Nielsen Company.

According to Nielsen, the bottom line for the Laramie area is that it attracts far more sales than the local population could support, particularly in the gas station, food & beverage, and motor vehicle & parts industries (as shown above). This does not mean, however, that the Laramie economy cannot improve. In fact, there are several key retail industries that all substantial leakage that, if recaptured, could make a big difference to the local economy. Broadly speaking, Laramie should focus attention on strengthening and/or developing the following sectors:

- Eating & Drinking Places
- Sporting Goods, Hobby, Book & Music Stores
- Clothing & Accessories Stores
- Non-Store Retailers (includes mail order and Internet-based shopping)

There are other sectors that experience retail leakage, especially in the big box markets. However, in today's marketplace, it is very difficult to influence those markets and, even if one could, those efforts might have unintended negative consequences for other retailers. Therefore, Laramie should concentrate its efforts on the four sectors noted above. Development of non-store retailers is an excellent opportunity for entrepreneurship programs.

With the exception of general merchandise stores (big box stores), the retail sectors that have leakage are also the ones that, in the downtown area, are generating substantial sales. The large percentage of sales that are within these retail leakage sectors suggests an underlying obstacle for stores to capture local dollars. However, to the extent that local businesses can recapture those consumers, there is substantial upside for sales. These industries are represented in the following table.

Downtown Retail Sales and Percentage of Laramie Area Sales, by Retail Sector	Downtown Sales	Downtown % of Community Sales
Retail Surplus Sectors:		
Gasoline Stations	\$6,241,772	3.5%
Food & Beverage Stores	\$7,996,143	4.4%
Motor Vehicle & Parts Dealers	\$7,459,560	3.6%
Building Material, Garden Equip Stores	\$11,500,911	14.6%
Health & Personal Care Stores	\$1,423,407	4.0%
Retail Leakage Sectors:		
Furniture & Home Furnishings Stores	\$1,655,100	18.2%
Miscellaneous Store Retailers	\$3,061,869	21.9%
Electronics & Appliance Stores	\$3,653,347	43.9%
Eating & Drinking Places	\$13,110,131	22.5%
Sporting Goods, Hobby, Book & Music Stores	\$820,961	27.2%
Clothing & Accessories Stores	\$2,983,034	33.4%
General Merchandise Stores	\$283,228	0.7%
Non-Store Retailers	\$516,812	25.8%

Source: CBI analysis based on 2014 Data from The Nielsen Company.

Because of strong existing sales, special efforts should be made to help improve the businesses that are located downtown, in the following industries.

- Furniture & Home Furnishings Stores
- Miscellaneous Store Retailers
- Electronics & Appliance Stores
- Eating & Drinking Places
- Sporting Goods, Hobby, Book & Music Stores
- Clothing & Accessories Stores
- Non-Store Retailers

Specific efforts should include training (business planning and marketing), assistance with new product/service development, and efficiency training such as Lean Enterprise training, which teaches how to reduce waste and increase process efficiency. In Wyoming, Lean training is available from Manufacturing-Works. Additionally, collaborative efforts to cross-market and generate more customer traffic would be helpful. Finally, entrepreneurship training and support (including mentoring, planning, networking, and start-up assistance) can help, especially with the non-store retailer industry.

Building and Business Survey

A comprehensive "Downtown Business Survey" was conducted in the Downtown Laramie area from May through September of 2014. CBI administered the survey through Survey Monkey, and made hard copies available to those who did not wish to complete the survey on-line. CBI told respondents that the survey was being conducted in order to develop a building/business inventory for the LMSA. CBI developed the questions with input from the Economic Restructuring Committee, who also provided valuable assistance carrying surveys and reminder postcards from business to business. Weekly drawings provided incentives for businesses to complete the survey. A total of 99 respondents completed surveys, representing an approximate response rate of 39%, assuming there are 258 total businesses downtown.

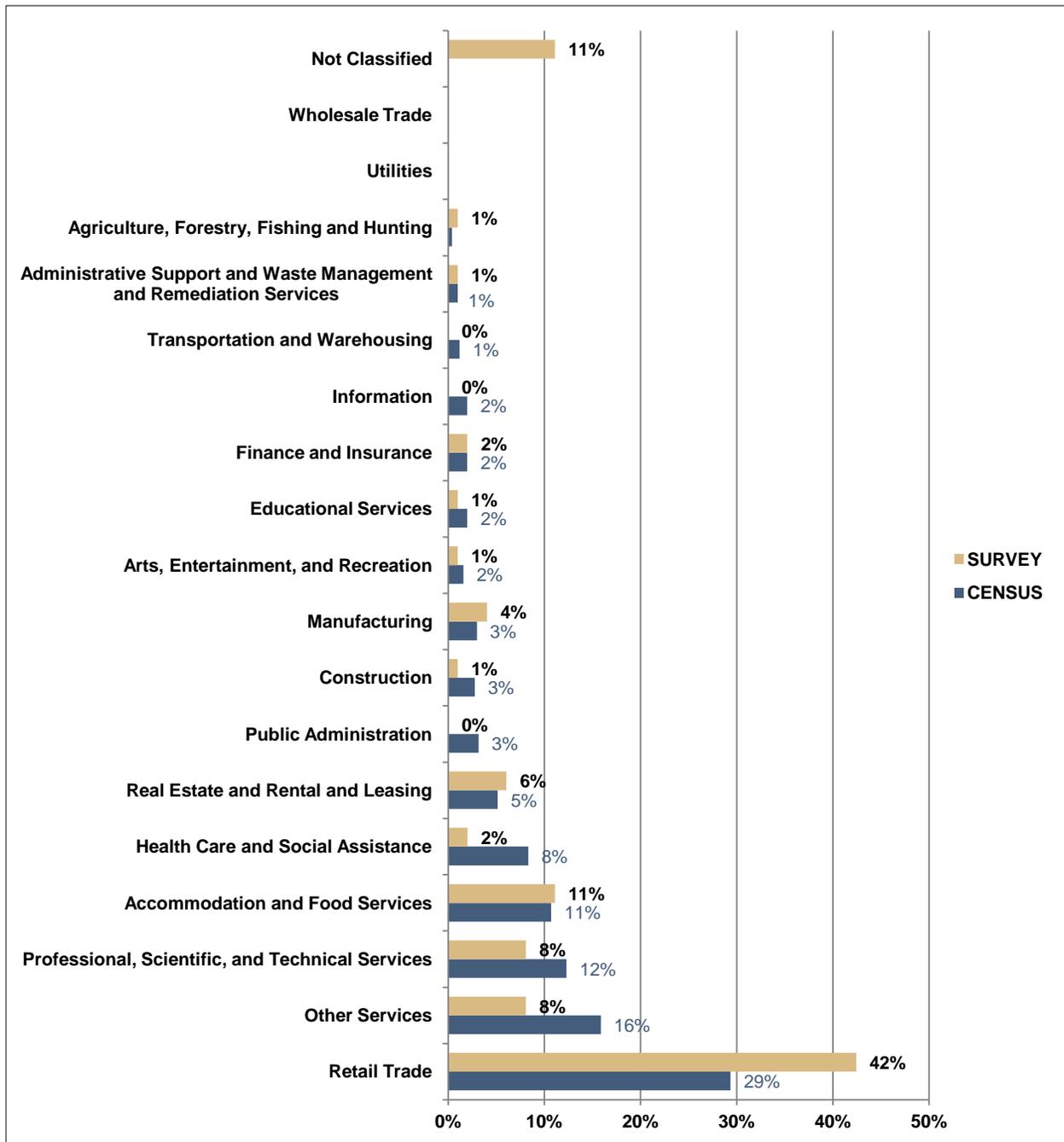
Several goals were identified early on in the survey process. LMSA wanted updated contact information, including business owner, business operator, address, phone, and email information. Although most businesses utilize the internet and have email addresses, there are still some who rely on postal service mail and telephones. Thus, it will be important for LMSA to continue to reach out to these businesses by personal visits, phone calls, and by mailing information out so that those who do not use social media can stay connected. Approximately 17% of those who responded to the business survey do not use social media in their marketing and 12% do not use the internet at all.

For a copy of the survey instrument and outreach reminders used, please see Appendix. A summary of each question in the survey follows.

Question #1 - Description of the goods/services provided

This open-ended question allowed CBI to properly categorize each business. To categorize businesses, CBI uses the North American Industry Classification System (NAICS) to identify industry sectors and sub-sectors. CBI then created a comparison chart to compare the survey responses with the larger Downtown Laramie population (as identified by the physical census of actual businesses generated by CBI).

The chart on the following page compares the percentage of businesses in each category by physical observations (census), compared to the percentage of businesses in each category that responded to the business survey. Note that "retail trade" is somewhat overrepresented in the survey at 42% of total businesses who returned surveys compared to an "actual" percentage of 29% retail. Conversely, "other services" (personal care services, social services, etc.) is underrepresented in the survey by 8% compared to the actual demographics downtown. Other industries appear to be equally represented by both measures.



The table below presents this information in a chart with the actual number of each type of business indicated. The charts that follow present this information in two separate percentage-based pie charts for greater analysis.

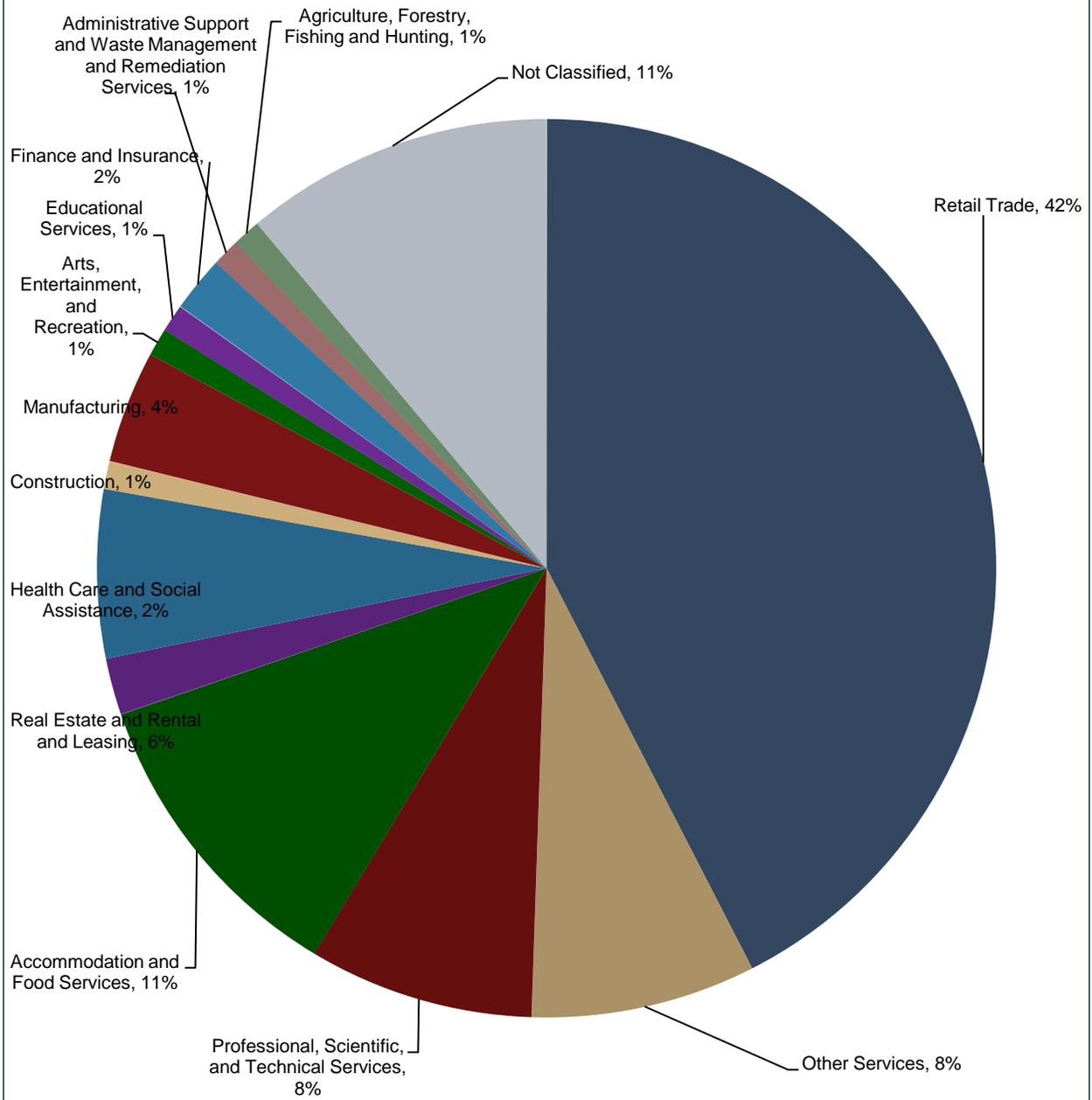
CBI observes that the downtown’s mix of commercial and retail businesses, as well as residential opportunities, offers the kind of services and lifestyle usually only found in much larger communities. As Laramie continues to expand existing businesses, add new businesses,

and improve residential opportunities, the entire community will benefit from this lively and synergistic downtown atmosphere.

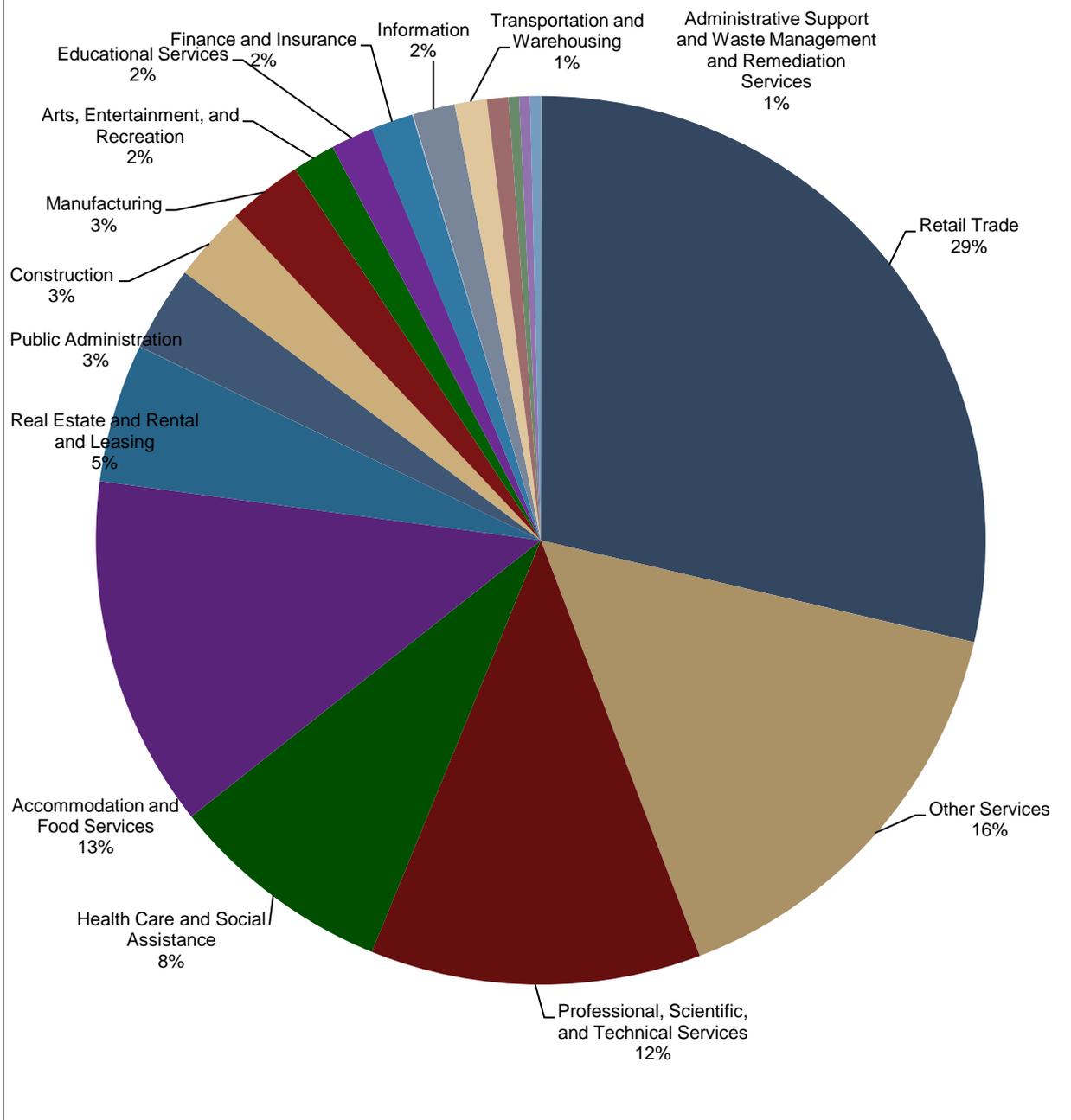
Number of Businesses in Downtown Laramie by NAICS Sector

NAICS Sector and Typical Sub-Sectors	Physical Census	Survey
Retail Trade - Automotive Stores, Clothing Stores, Electronics, Florists, General Merchandise, Health and Personal Care, Jewelry, Office Supply, Specialty Food, Sporting Goods, Used Merchandise, etc.	74	42
Other Services - Automotive Repair, Civic and Social Organizations, Dry Cleaning/Laundry, Greeting Services, Personal Care Services, Religious Organizations, Social Advocacy Programs, etc.	40	8
Professional, Scientific, and Technical Services - Accounting, Tax Preparation, Architectural, Engineering, Legal, Management, Scientific, Technical	31	8
Accommodation and Food Services - Restaurants, Bars, Traveler Accommodation	33	11
Health Care and Social Assistance - Community Food and Housing, Individual and Family Services, Medical Laboratories, Offices of Health Practitioners, Physician Offices, etc.	21	2
Real Estate and Rental and Leasing - Real Estate Agents and Brokers	13	6
Public Administration - Administration of Economic Programs, Executive, Legislative and Other General Government Support, Justice, Public Order and Safety	8	0
Construction - Building Equipment Contractors, Residential and Non-Residential Construction, Foundation, Structure, and Exterior Construction	7	1
Manufacturing - Footwear Manufacturing, Fabricated Metal Products, Printing and Related Support, etc.	7	4
Arts, Entertainment, and Recreation - Museums and Similar Institutions, Arcades	4	1
Educational Services - Schools and Instruction, Educational Support	4	1
Finance and Insurance - Banks, Insurance Carriers	4	2
Information - Newspaper, Radio and Television Broadcasting, Wired Telecommunication Carriers	4	0
Transportation and Warehousing - Freight, Taxi and Limousine Service, Warehousing	3	0
Administrative Support and Waste Management and Remediation Services - Services to Buildings and Dwellings	2	1
Agriculture, Forestry, Fishing and Hunting - Support Activities for Forestry	1	1
Utilities - Natural Gas Distribution	1	0
Wholesale Trade - Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	1	0
Not Classified	0	11
TOTAL	258	99

Percentage of Businesses - Survey

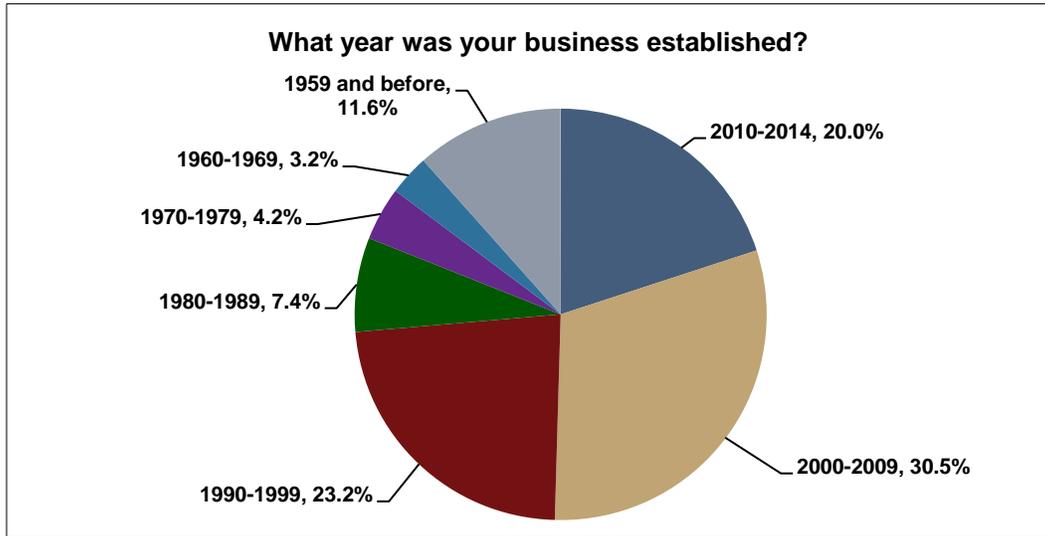


Percentage of Businesses - Census



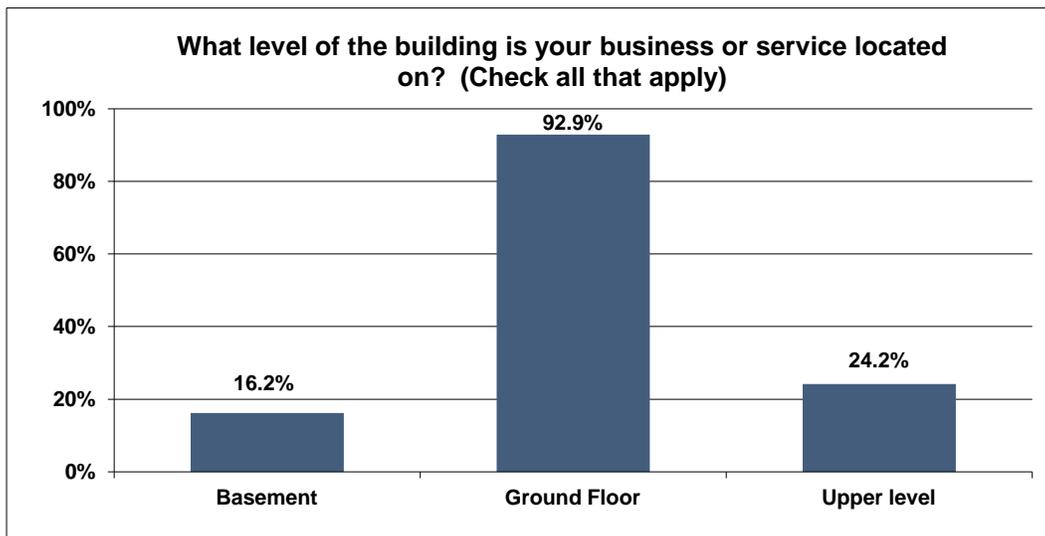
Question #2 - Date Business Established

The responses to this question demonstrate the stability of the Laramie Downtown businesses. The chart below indicates that roughly 50% of all businesses were established in the past 15 years. The positive trend is that a similar percentage have been in business for 15 years or more!



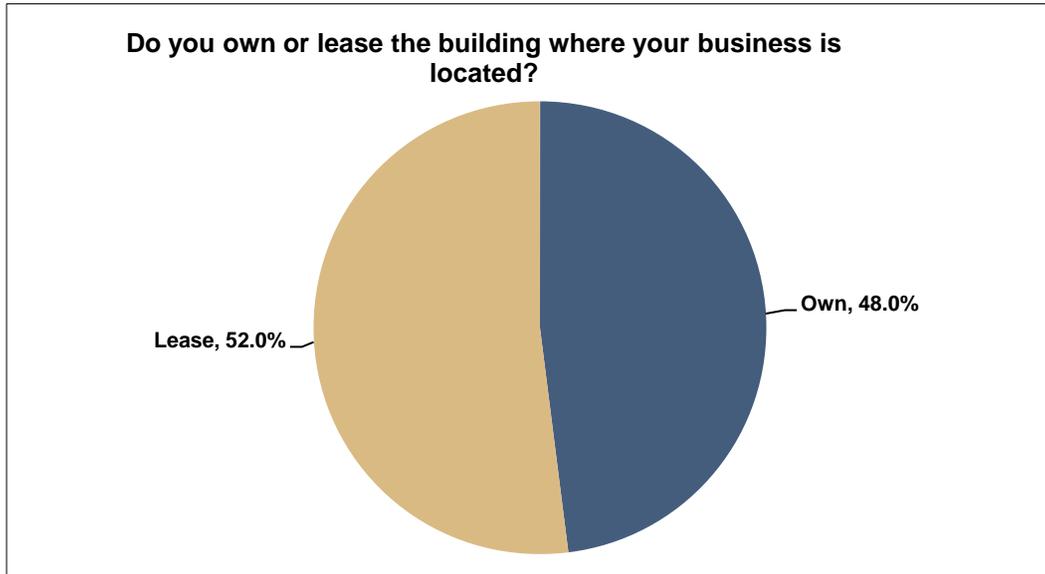
Question #3 - Level Business is Located On

Predictably, most businesses are located on the ground floor of the facility, although Laramie has a large number of second story buildings and a scattering of taller structures. Many of the upper levels are used for residential purposes. An earlier survey conducted by LMSA indicated that there may be 90 total residential units in Downtown Laramie.

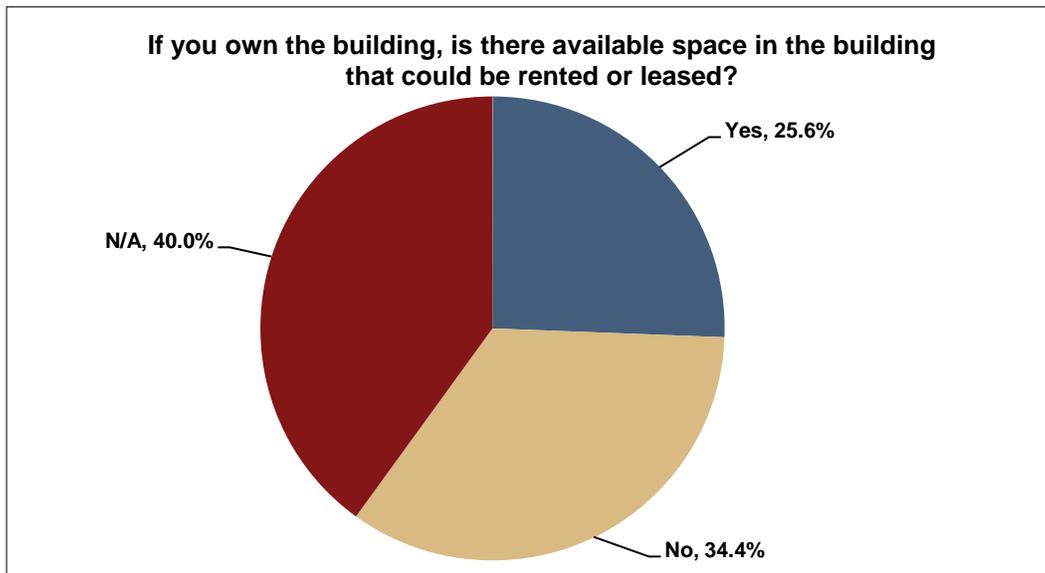


Question #4 - Own or Lease?

The ratio of ownership to leasing of the business structure is fairly even. This is good that almost half of Downtown structures are owned as well as operated by the business owner. The physical inventory conducted by CBI indicates that there are at least 166 different property owners in Downtown Laramie.



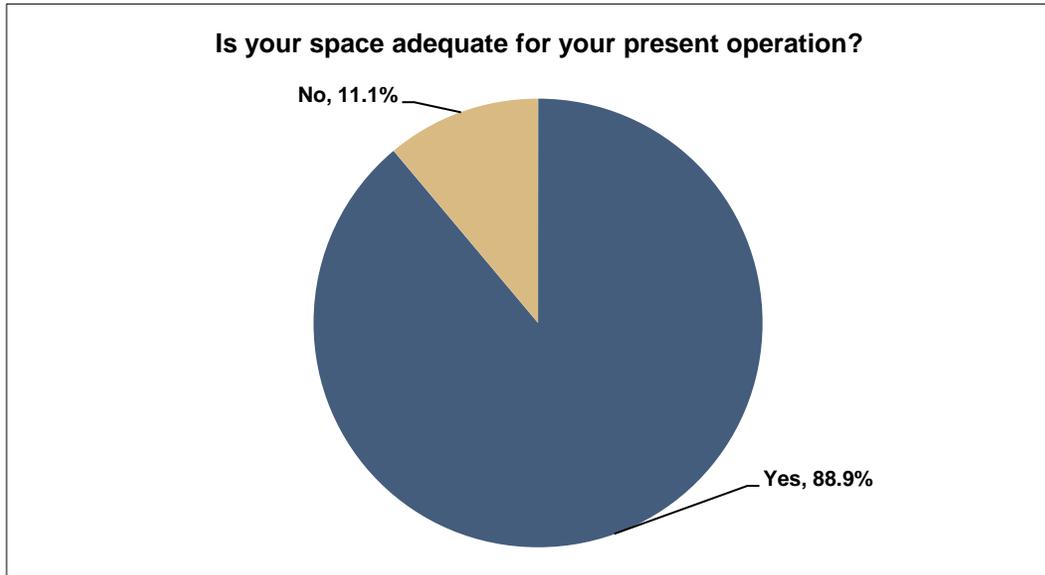
Question 5 - Available rental or lease space



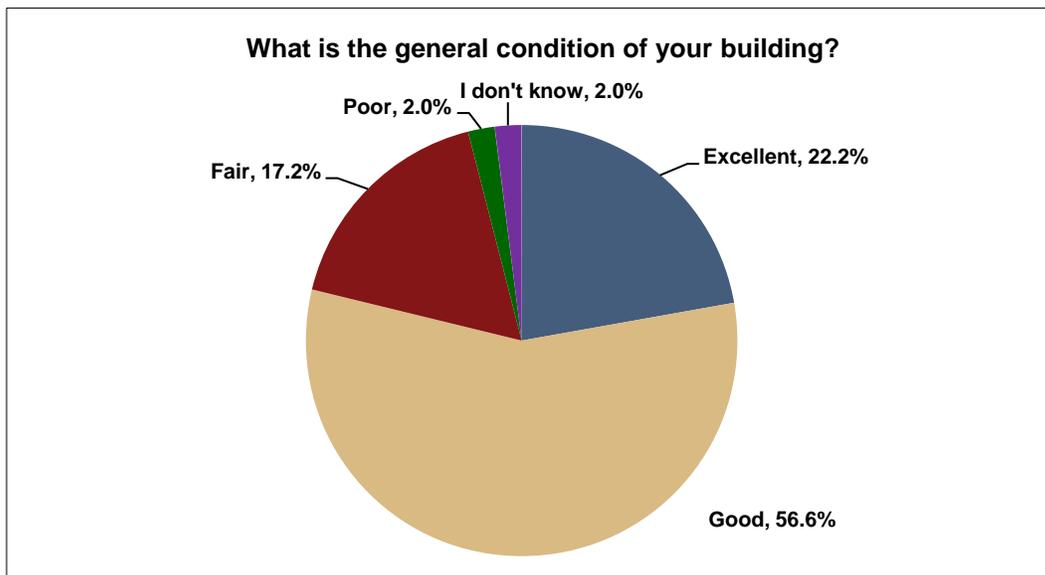
Twenty-three (23) businesses responded that they did have space that could be utilized for rental or lease. A high percentage of these properties were either upper level or basement spaces.

Question #6 - Adequate Space

The vast majority of respondents are satisfied with the space availability for their current operation. This figure is actually slightly higher than the response in 2007, when an earlier study was conducted of Downtown businesses.



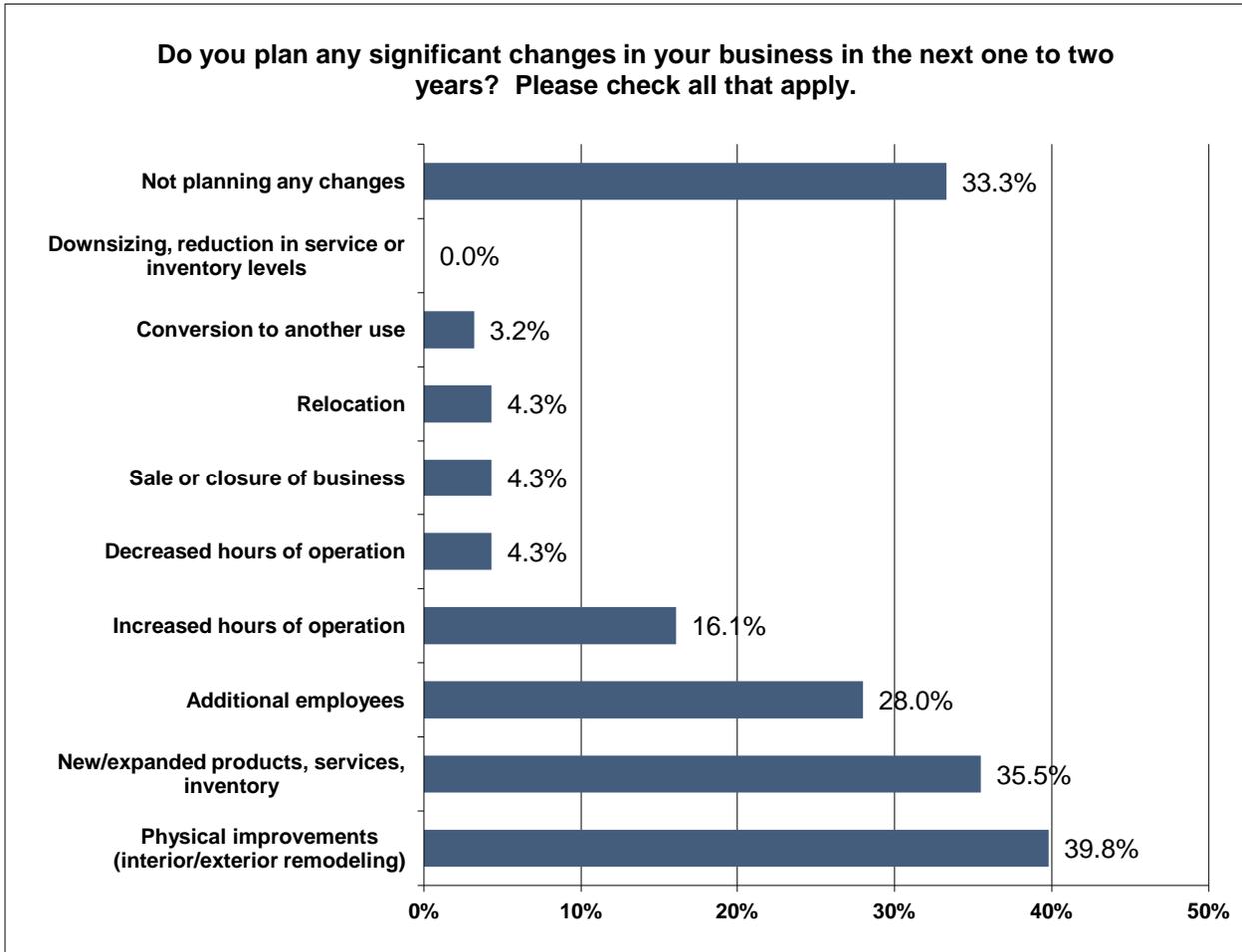
Question #7 - General Condition of Building



For a historic downtown area, buildings are in remarkably good condition with almost 75% of survey respondents reporting the condition of their building as either "good" or "excellent."

Question #8 - Planned Business Changes

One third of all respondents are not planning any changes, slightly more are planning some sort of physical improvements (39%), and 35% plan to expand products, services or inventory. According to the survey, less than 5% plan to either relocate or sell or close the business.



Question #9 - How many employees does this business employ at this location?

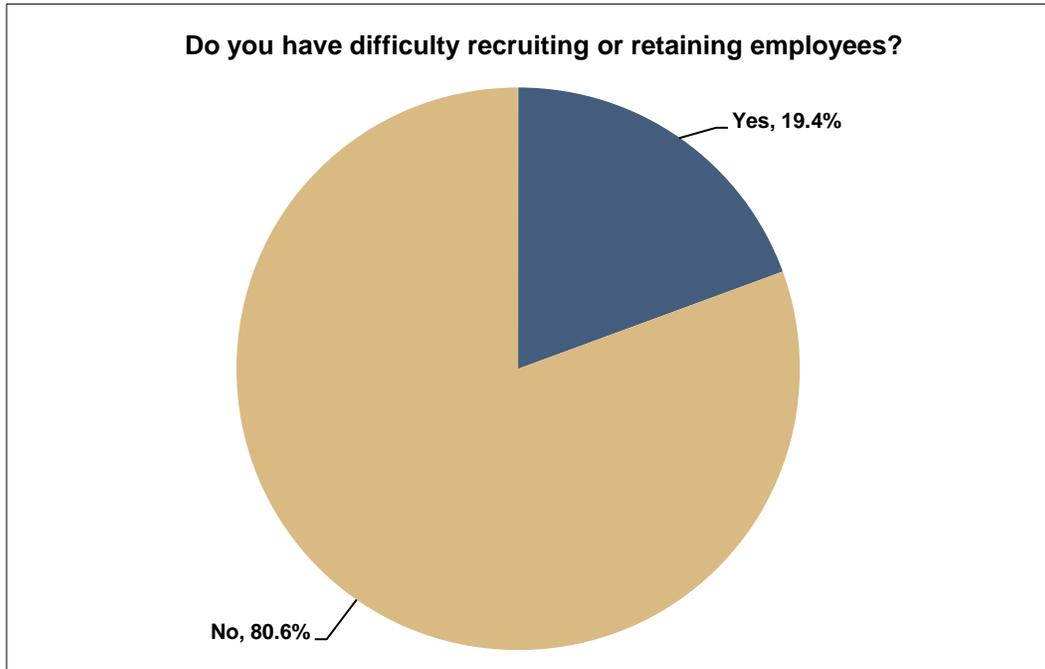
Of the 97 respondents who answered this question, the following employee numbers were reported:

Full-time	182
Part-time	123
Seasonal	12
Total	317

(Note: Actual numbers of employees are discussed in the Economic Profile section on page 9.)

Question #10 - Difficulty recruiting or retaining employees?

Less than 20% of survey respondents report any difficulty recruiting or retaining employees. The college student population provides a larger pool of applicants than is present in other areas of Wyoming.



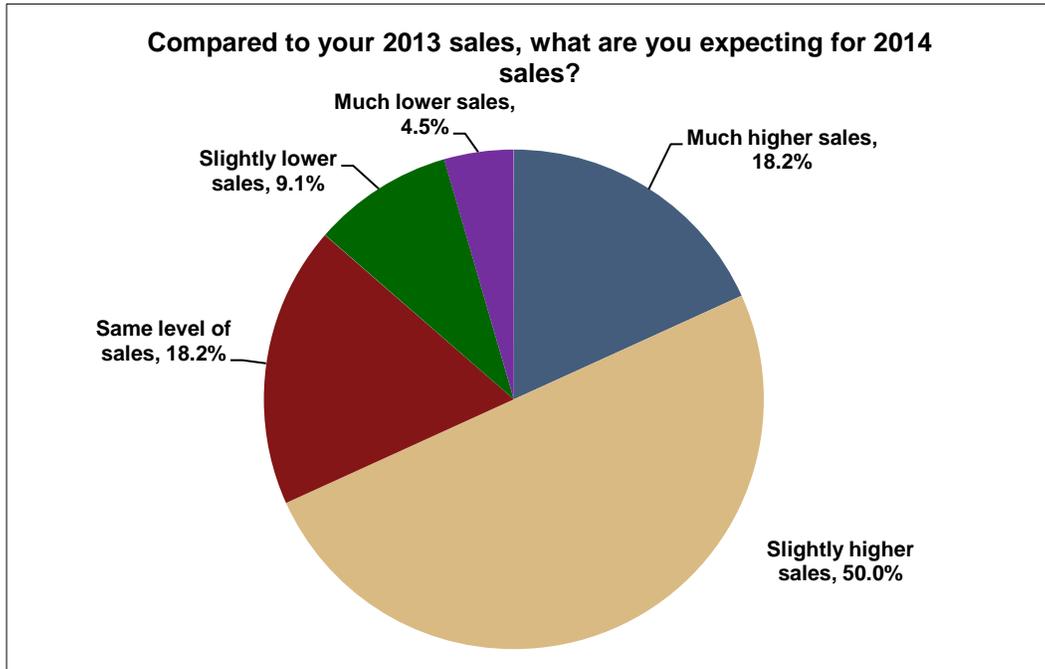
Question #11 - Total amount of Downtown Sales in 2013

Although a number of businesses did not reply to this question, the 74 businesses that did respond reported a total of \$45.7 million dollars in sales in 2013. Actual sales are discussed in the Economic Profile section below.

(Note: Actual numbers for the amount of sales in fiscal year 2014 are discussed in the Economic Profile section)

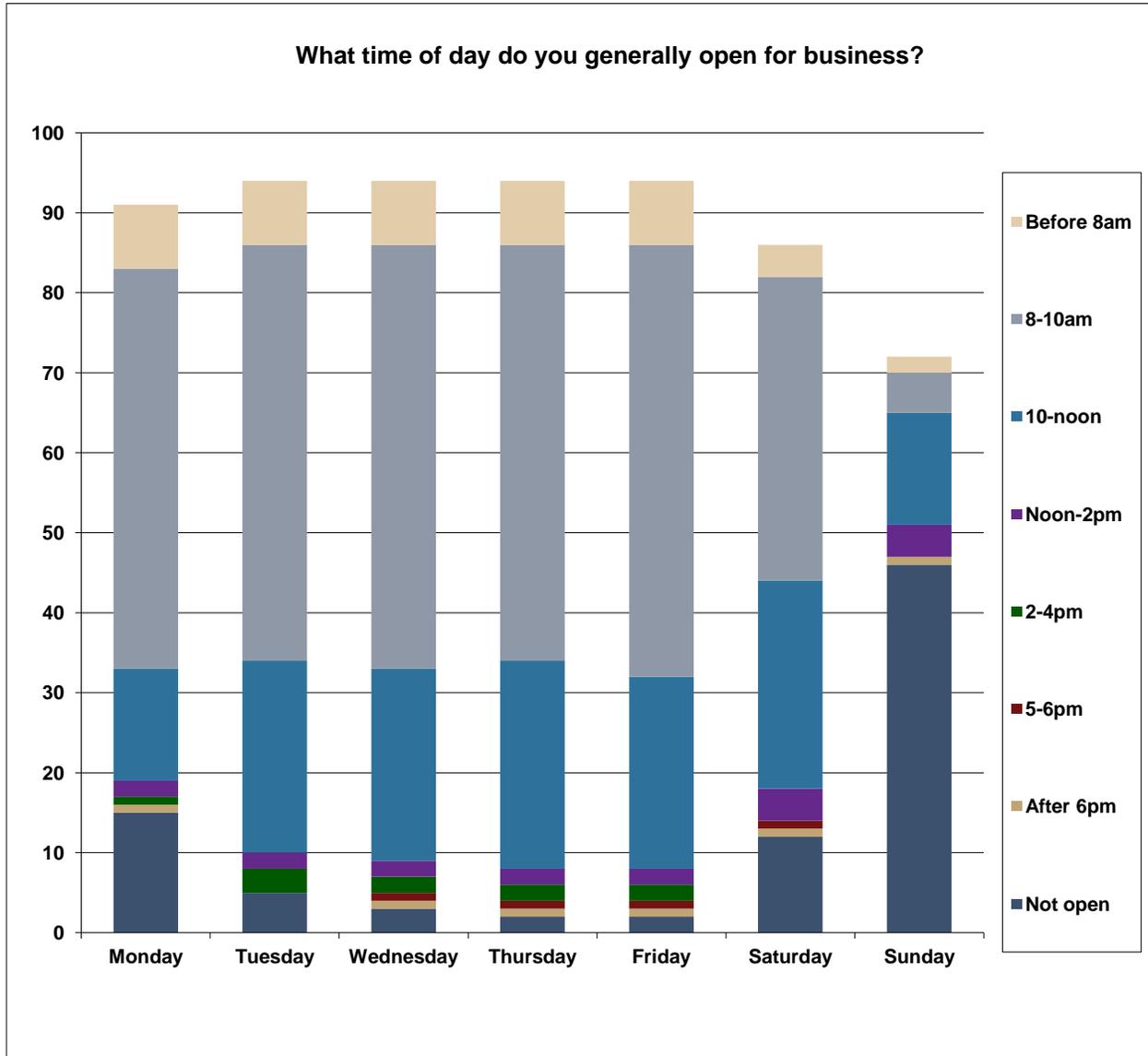
Question #12 - Estimated Sales - 2014

Responses on sales expectations are quite encouraging, with 68% of the businesses expecting higher sales than in 2013. About 15% expect lower sales, as can be seen on the chart that follows.



Question #13 -Time of Day Business is Open

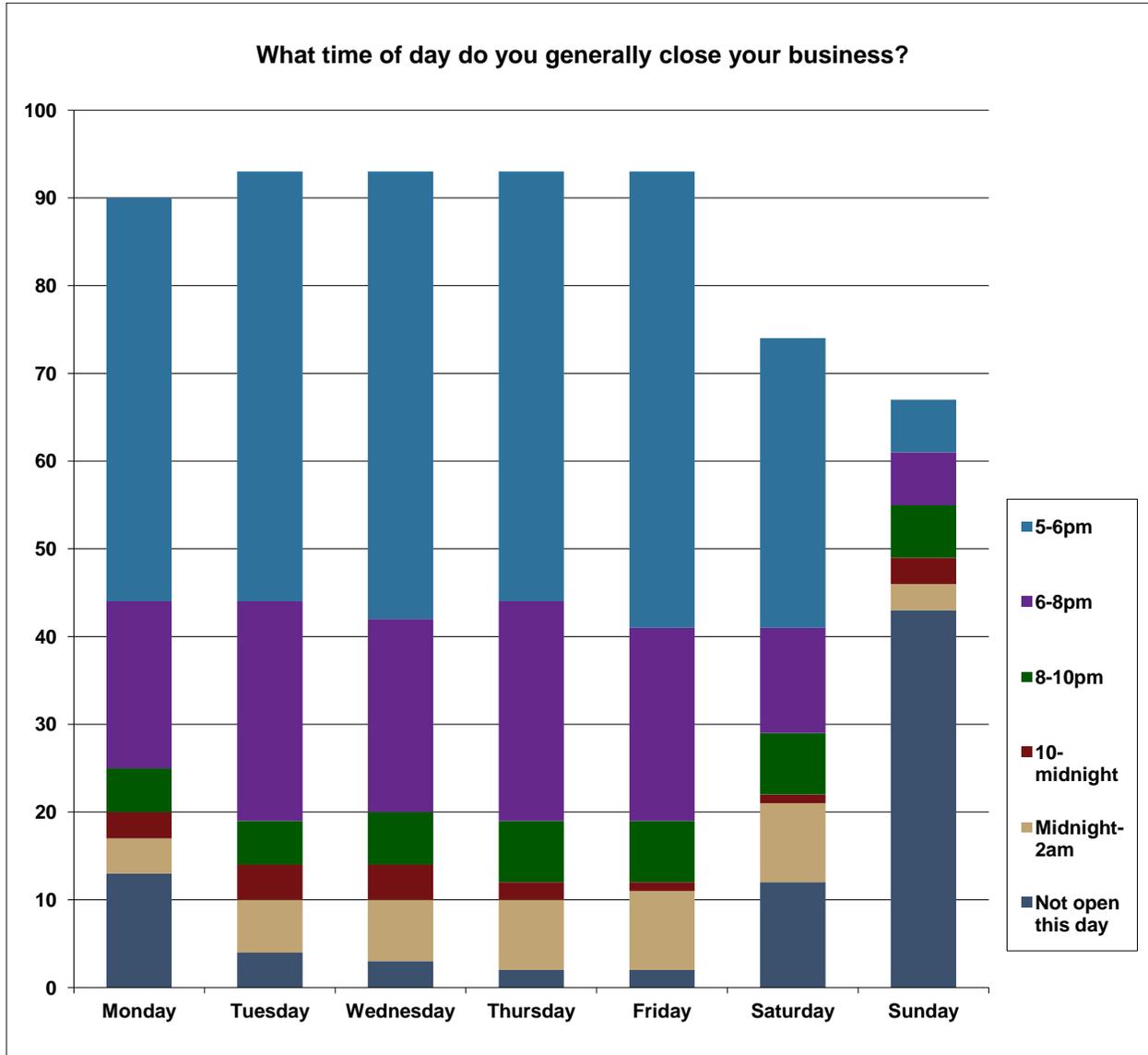
Small retail business owners are, by nature, independent risk takers with a clear concept of how to operate their business successfully. Hours of operation are a sensitive and critical topic for these businesses, as each makes his/her decision based on level of staffing, cost factors, knowledge of their customer base, and their own personal considerations.



A plurality of downtown businesses open sometime between 8:00 and 10:00 a.m. Monday through Friday. Slightly more businesses are closed on Monday than any other day of the week except Sunday.

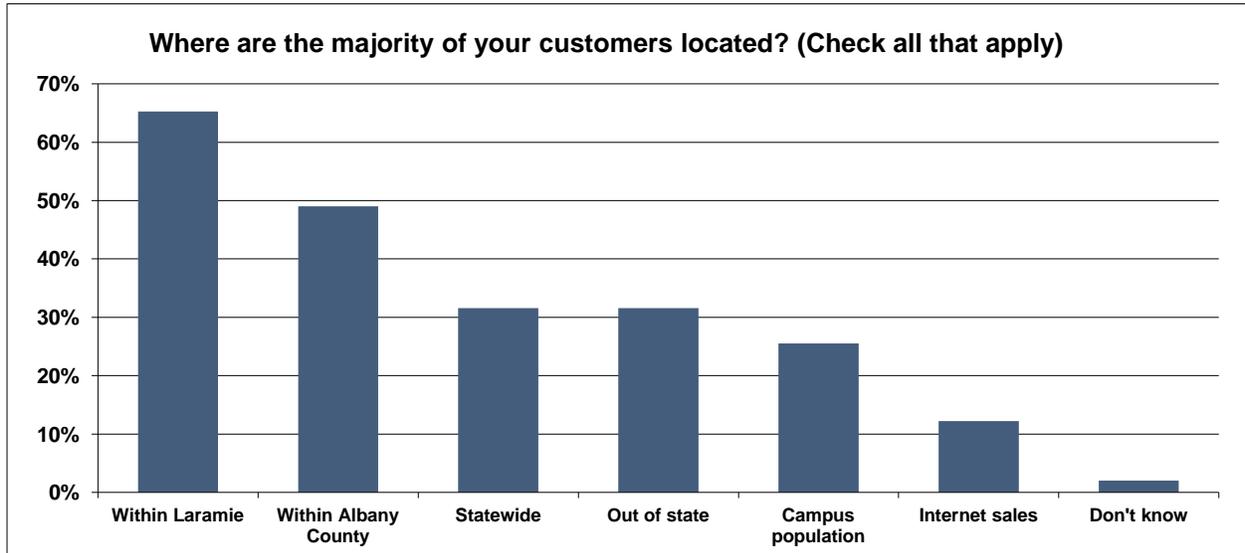
Question #14 - Time of Day Business Closes

Here, most businesses close between 5:00 and 6:00 p.m. Monday through Friday. Very few businesses remain open after 8:00 p.m. (mostly the food and drinking places).



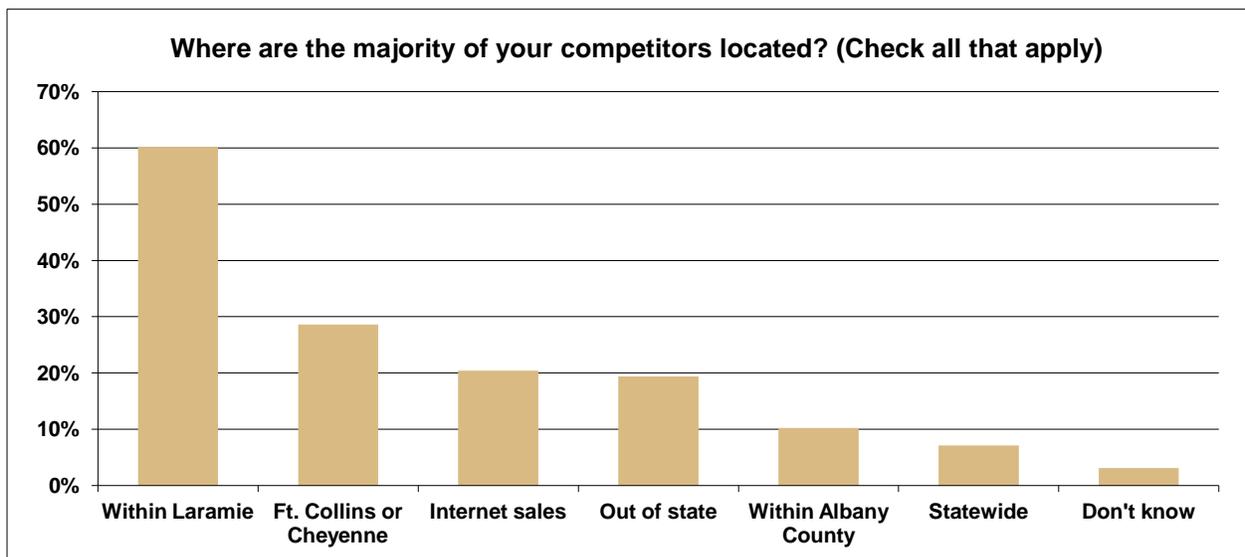
Question #15 - Where Customers are Located

Sixty-five percent (65%) of businesses surveyed report that the majority of their customers come from within the Laramie community. Twenty-five (25%) come from the campus population. Only 12% rely on Internet sales. Use of the Internet to boost sales is an area Downtown Laramie should focus on in the future.



Question #16 - Majority of Competitors Location

As noted below, a similar percentage of survey respondents (60%) report that their major competitors are located within the Laramie Community. Twenty-eight percent (28%) lose customers to Ft. Collins or Cheyenne; and Internet sales represent 20% of the competition.



Question #17 - Wholesaler Location

Suppliers typically come from out of state but 30% of surveyed businesses get their supplies from within the Laramie community.



Question #18 - Major Issues or Challenging Facing Business

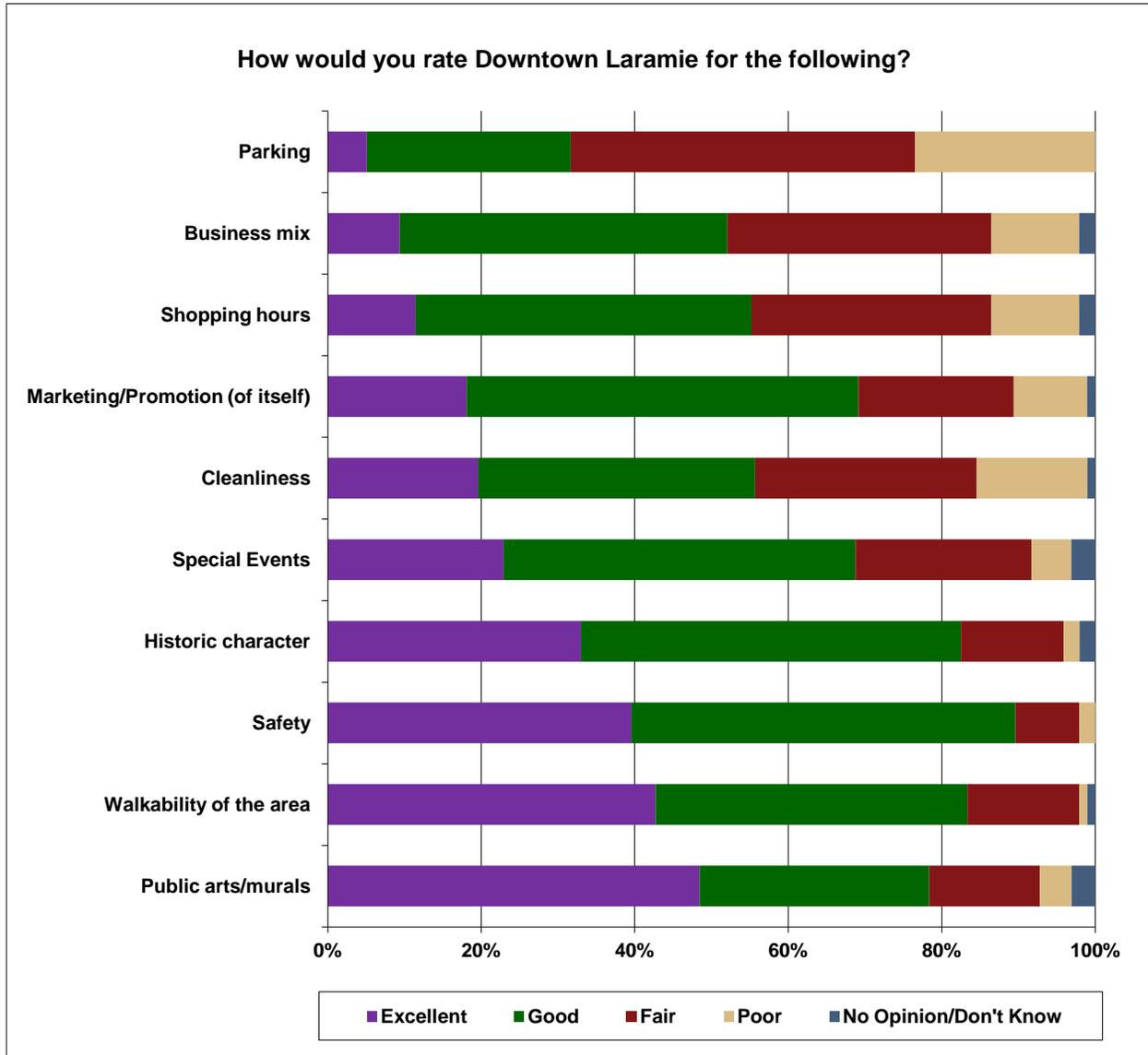
Parking and internet sales topped the list of major challenges facing the businesses. Space constraints, employee retention, and the general economy were also noted. For a full list of responses to this survey question, please see Appendix "A", page 16.

Question #19 - Major Assets and Benefits that Help the Business

This open-ended question had a wide variety of responses. Some of the more frequent responses included foot traffic, location, customer service, customer loyalty, loyal employees, healthy downtown with great atmosphere and culture, and high quality products. Again, for a full list of responses to this question, see Appendix "A", page 18.

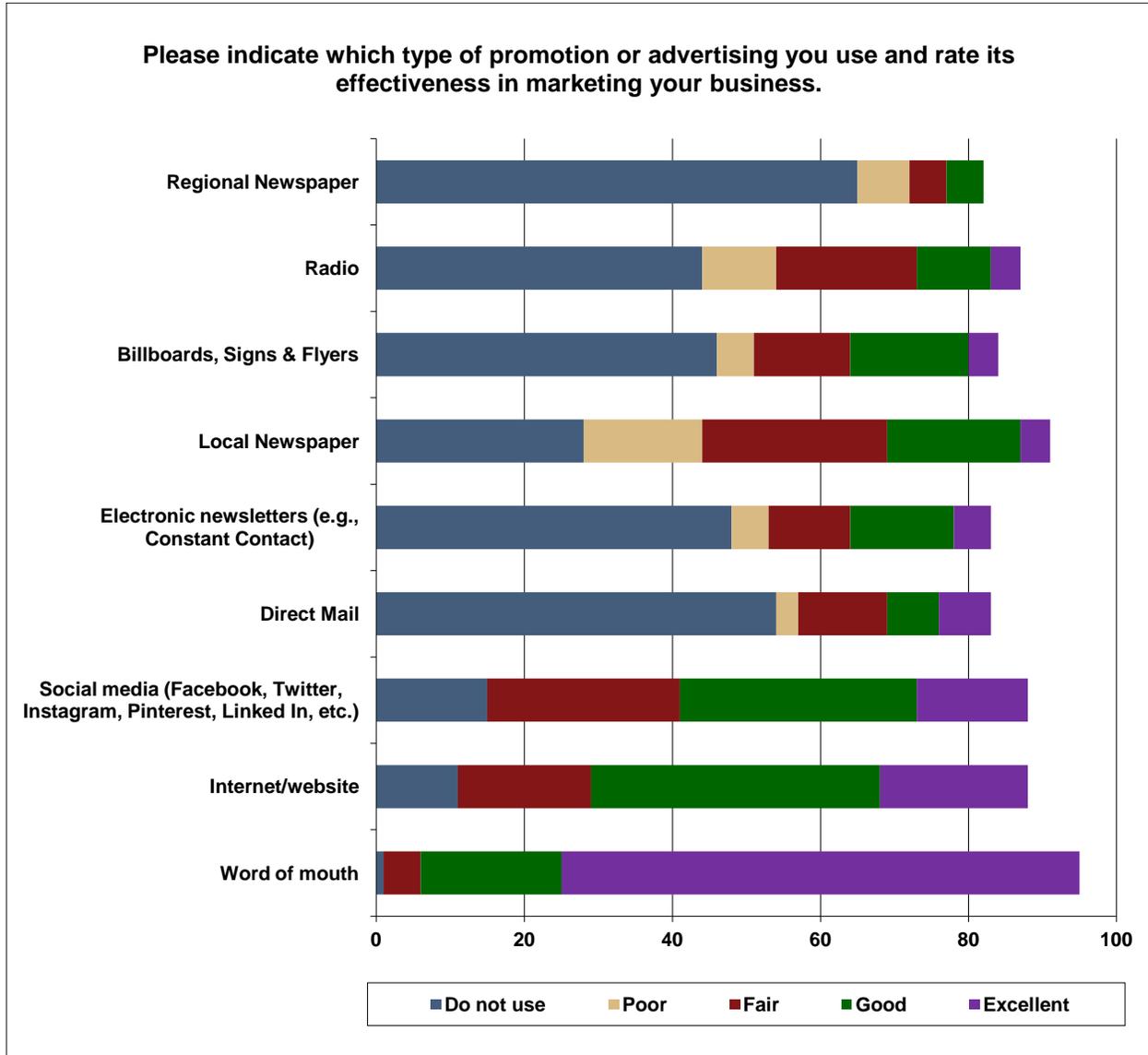
Question #20 - Rating of Specific Downtown Attributes

As seen in the chart below, parking and business mix ranked lowest in Downtown attributes. At the other end of the scale, public arts/murals, walkability of the area and safety topped the list of the best Downtown attributes.



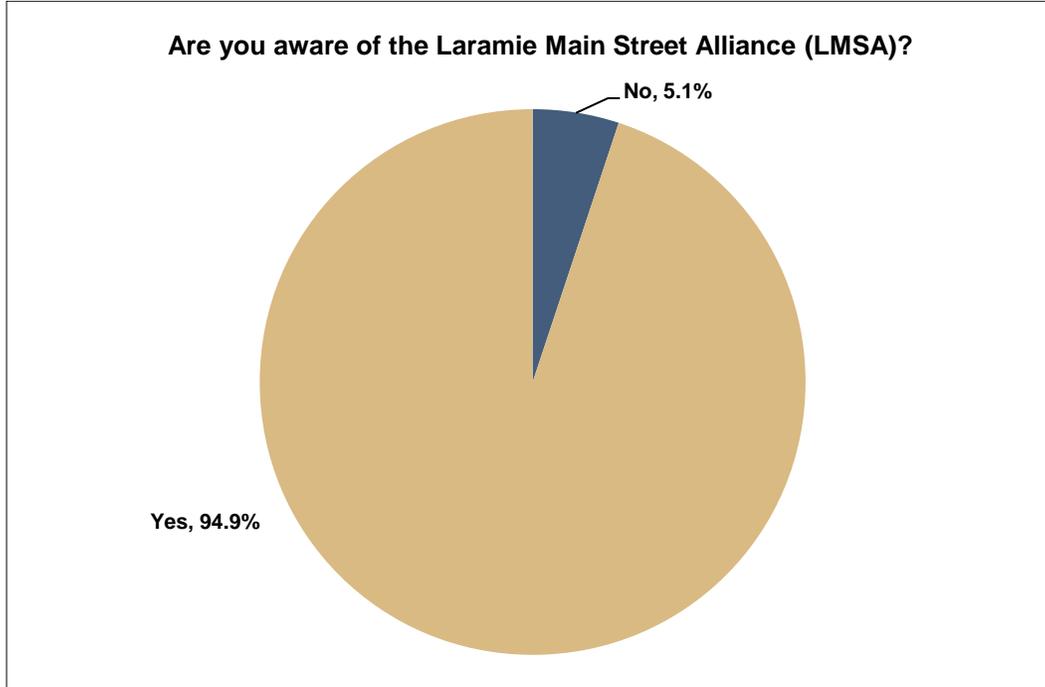
Question #21 - Effective Promotion Techniques

Word of mouth is by far the most utilized way of promoting business in Downtown Laramie, as can be seen on the following chart.



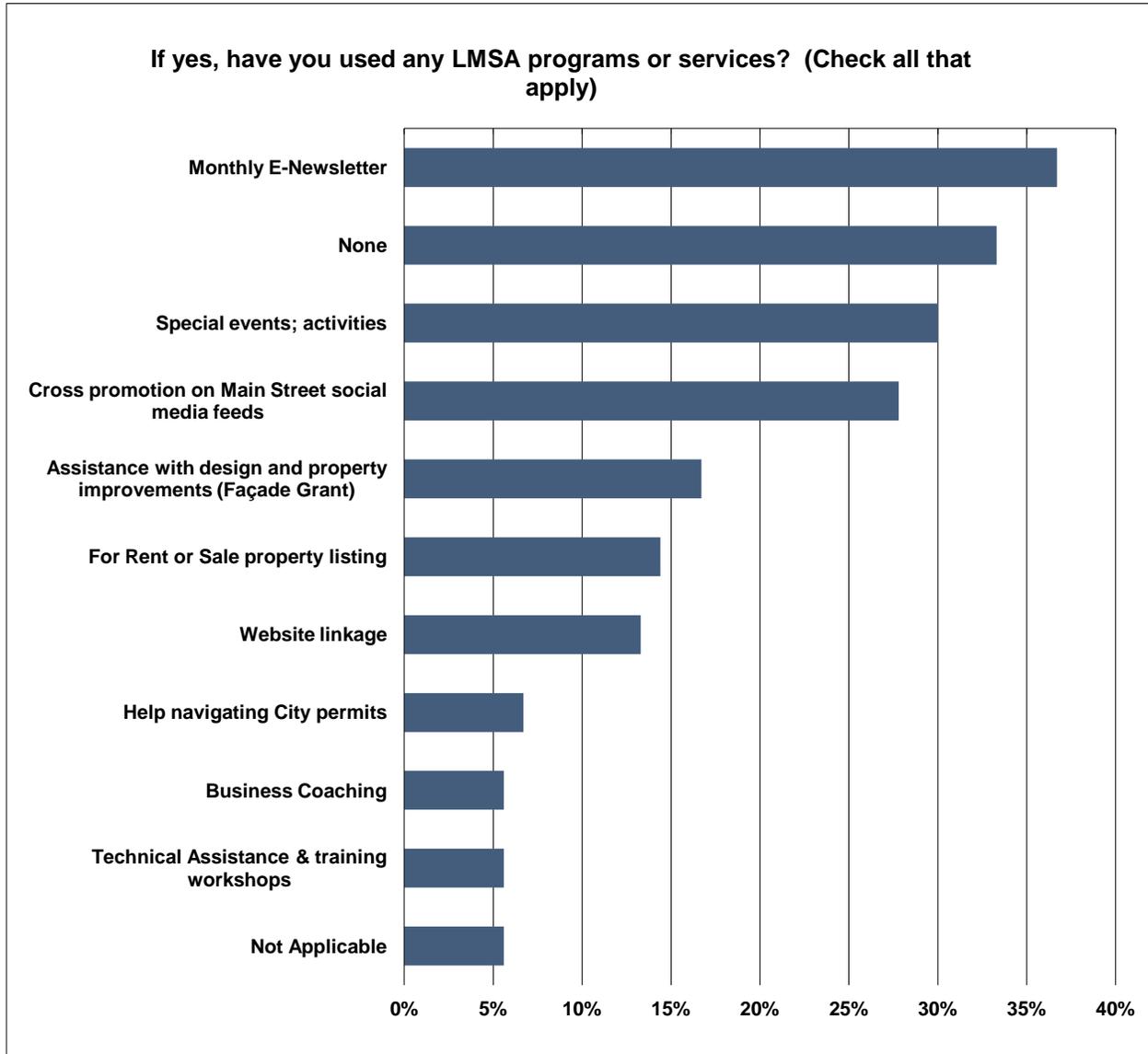
Question #22 - Awareness of LMSA

LMSA does an excellent job with outreach, and 95% of all survey respondents aware of the organization.



Question #23 - Use of LMSA Programs or Services

Thirty-six percent (36%) of those who responded utilize the monthly E-newsletter, but 32% do not use any of the services or programs offered by the LMSA. Thus, while much of Downtown is aware of LMSA, some additional education and connectivity is important to further engage the downtown business community.



Question #24 - How Laramie Main Street Can Better Serve Businesses

This was another open-ended question with 51 responses. Some of the suggestions focused on a need to reach out to the edges of the Main Street boundaries. CBI representatives who walked around the district met a number of business owners who feel left out of the downtown activities. Some of them do not use Internet. Additional outreach, including more personal contact with ALL downtown businesses, would be very helpful. There were also numerous comments about the high quality of the current LMSA Executive Director, Trey Sherwood, and the LMSA in general. Full responses can be found in Appendix "A", page 22 .



Updating Model

CBI's census of buildings and businesses in the designated Downtown District is only as good as the updating that must occur on a regular basis. CBI has created an Excel spreadsheet called the "Downtown Laramie Business Inventory," dated September 14, 2014. It is critical that this document be reviewed and updated on a regular basis. A companion to the spreadsheet is a thumb drive with photographs of most of the buildings and businesses in the Downtown area.

The spreadsheet includes the following information:

- Maps showing the block numbers for the designated Downtown Laramie boundaries as well as a copy of the City of Laramie Zoning overlay map.
- Property inventory that can be sorted in the following ways:
 - Notation that a picture of the business was taken
 - Indication as to whether a business survey was returned
 - The Block Number to identify which businesses are on which blocks
 - the Lot/Property Number from the Albany County Assessor's Office
 - Name of the Business
 - Address # of the Business
 - Address by Street Name of Business
 - City, State, Zip
 - Email address of contact
 - Phone Number
 - Building Owner, if known
 - Contact name
 - Indication if building is vacant or occupied
 - Features, number of stories
 - Square footage of business
 - Assessed valuation (Albany County Assessor records)
 - NAICS Sector Number
 - NAICS Sector Name
 - NAICS Sub-Sector Number
 - NAICS Sub-Sector Name
- A worksheet that sorts all businesses who returned surveys by NAICS Sector and Sub-Sector
- A worksheet that sorts all businesses identified by NAICS Sector and Sub-Sector
- A worksheet that compares survey results to actual census observed.

In addition to updating the building and business inventory spreadsheet, CBI recommends that LMSA use one or more of the following methods to regularly update this report:

1. Annual surveys of downtown businesses. The survey used for this study would work well to observe trends, identify strengths and weaknesses, and to gather current contact information. However, this method does not accurately capture the total number of employees, wages, or sales. Other methods are necessary for those components of the local economy.
2. Update the Nielsen Company's profiles every October. Nielsen updates its databases in late September each year. CBI can assist with this effort or LMSA can purchase the profiles directly from The Nielsen Company (<http://www.nielsen.com/us/en.html>). Care should be taken to request reports for the same area (i.e., a 0.3-mile radius and a 5-mile radius from the corner of Grand Avenue and Third Street in Laramie).
3. Monitor and analyze the excise tax reports for Albany County at the minor industry detail level.
4. Develop a new program directly with downtown businesses that encourages them to confidentially share with LMSA (or some third party) copies of their unemployment insurance and excise tax reports. If a substantial number of businesses participated in such a program, very accurate information on sales, employment, and wages could be monitored. Unfortunately, many businesses are not willing to share this information (as evidenced by the limited responses to survey conducted for this study).

Consumer Intercept Survey

CBI developed and supervised a process to conduct intercept surveys of a targeted 100-150 shoppers in the Laramie area. A combination of survey mechanisms were used including tablet devices administered by CBI personnel, paper copies if requested, and online links for email groups and social media. Table tents with QR codes linking to the survey were placed at local restaurants and other venues.



A total response rate of 415 surveys was received, well above the goal established. Survey takers gathered 110 surveys using the tablet devices at targeted locations. Paper copies were available for consumers who did not wish to use the technology of a tablet device. Shoppers were stopped at two of the Downtown Farmer's Markets on August 28, and again on Sept 5 during the Downtown Mash Up, which was unfortunately rained out. A total of 6 hours were spent collecting surveys at those events. A table in the UW Student Union was also set up to collect responses from 8:00 a.m. to 1:00 p.m. on Sept 18. An additional 305 surveys were submitted online.

A goal of this process was to create a survey instrument that can be easily adapted to the next step anticipated by the City of Laramie (i.e., retail leakage analysis and evaluation of consumer shopping patterns in the entire Laramie community).

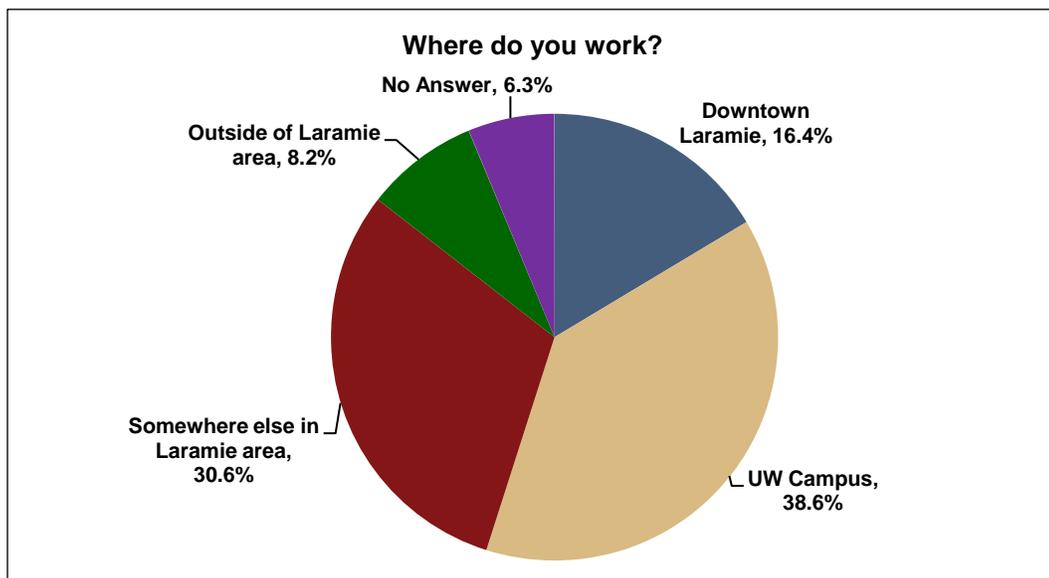
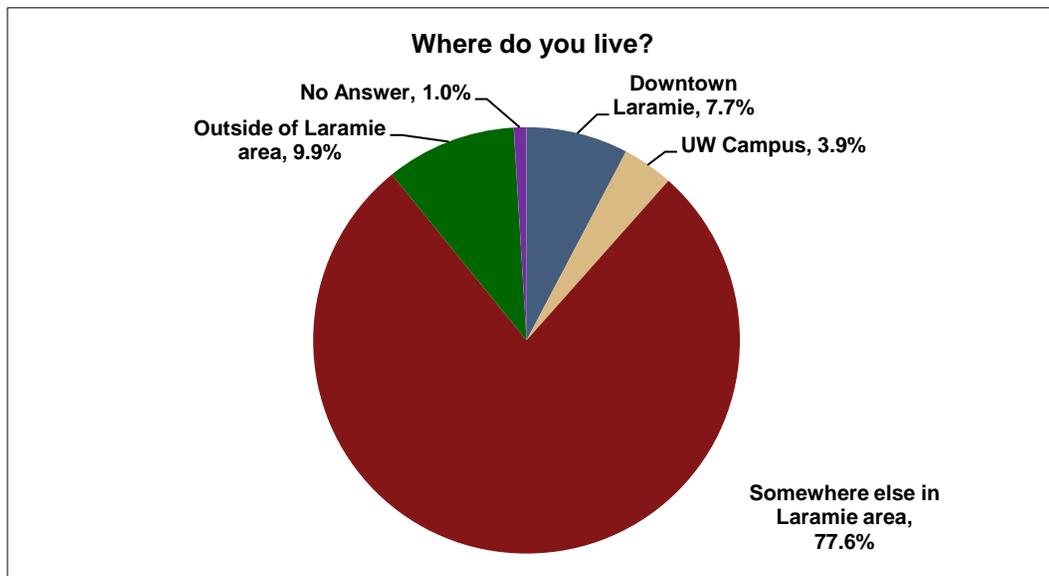
It was important to keep the consumer survey short so that shoppers could complete it in a few minutes. Eight questions were asked:

1. Where do you live and work? (Choose all that apply)
2. On average, how many times per month do you come to Downtown Laramie?
3. How would you rate Downtown Laramie for the following?
4. Where do you **most often** purchase the following? (Choose only one location)
5. Where do you **most often** go for the following purposes? (Choose only one location)
6. What would make you shop Downtown Laramie more often?
7. What is your gender?
8. What is your age?
9. Please provide an email address to be entered into a drawing for a \$50 Downtown Laramie Gift Certificate and to be added to the Laramie Main Street Alliance mailing list (you may opt out at any time)

Where do you live and work?

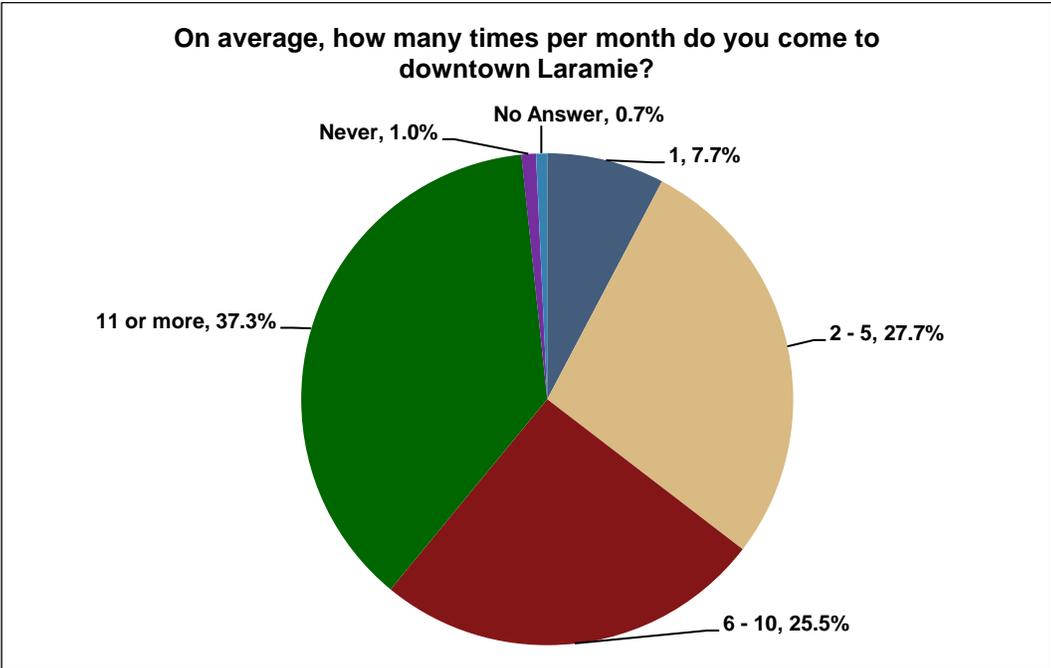
The majority of those surveyed live in the Laramie area, 4% call the University of Wyoming (UW) campus home and almost 10% are from outside of the Laramie area. Interestingly, 8% report living IN Downtown Laramie. Workplace is a bit more evenly distributed with 38.6% working on the UW Campus (a high percentage for a supposedly random consumer survey), 30% work somewhere else in the Laramie area, and only 16.4% work in Downtown Laramie.

There are a number of possible reasons for the high percentage of survey respondents who work on campus - the survey link was sent to the UW list serve; tablet survey responses were collected at the UW Student Union, and the population that typically enjoys shopping downtown is perhaps higher in a university community.

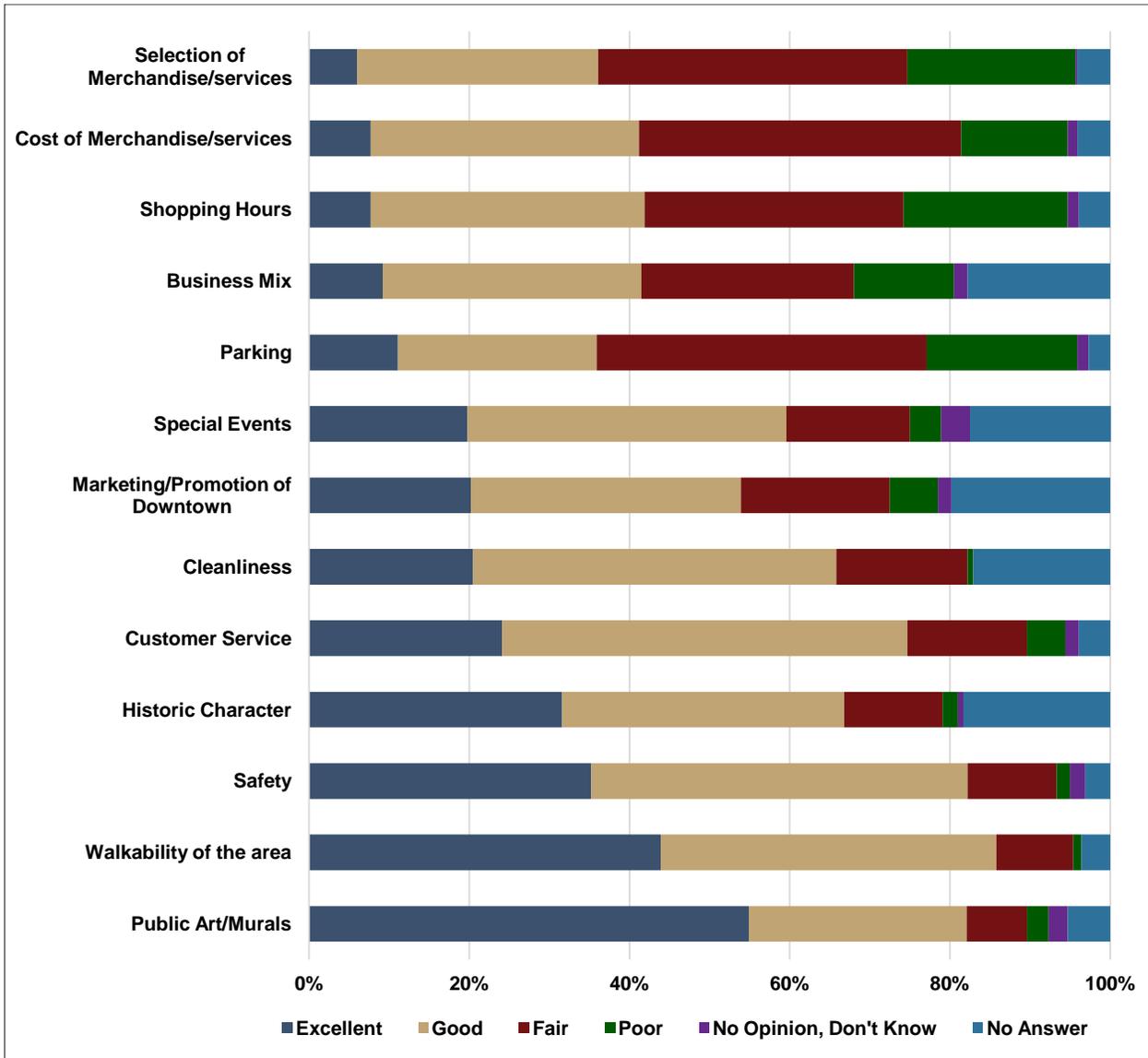


On average, how many times per month do you come to Downtown Laramie?

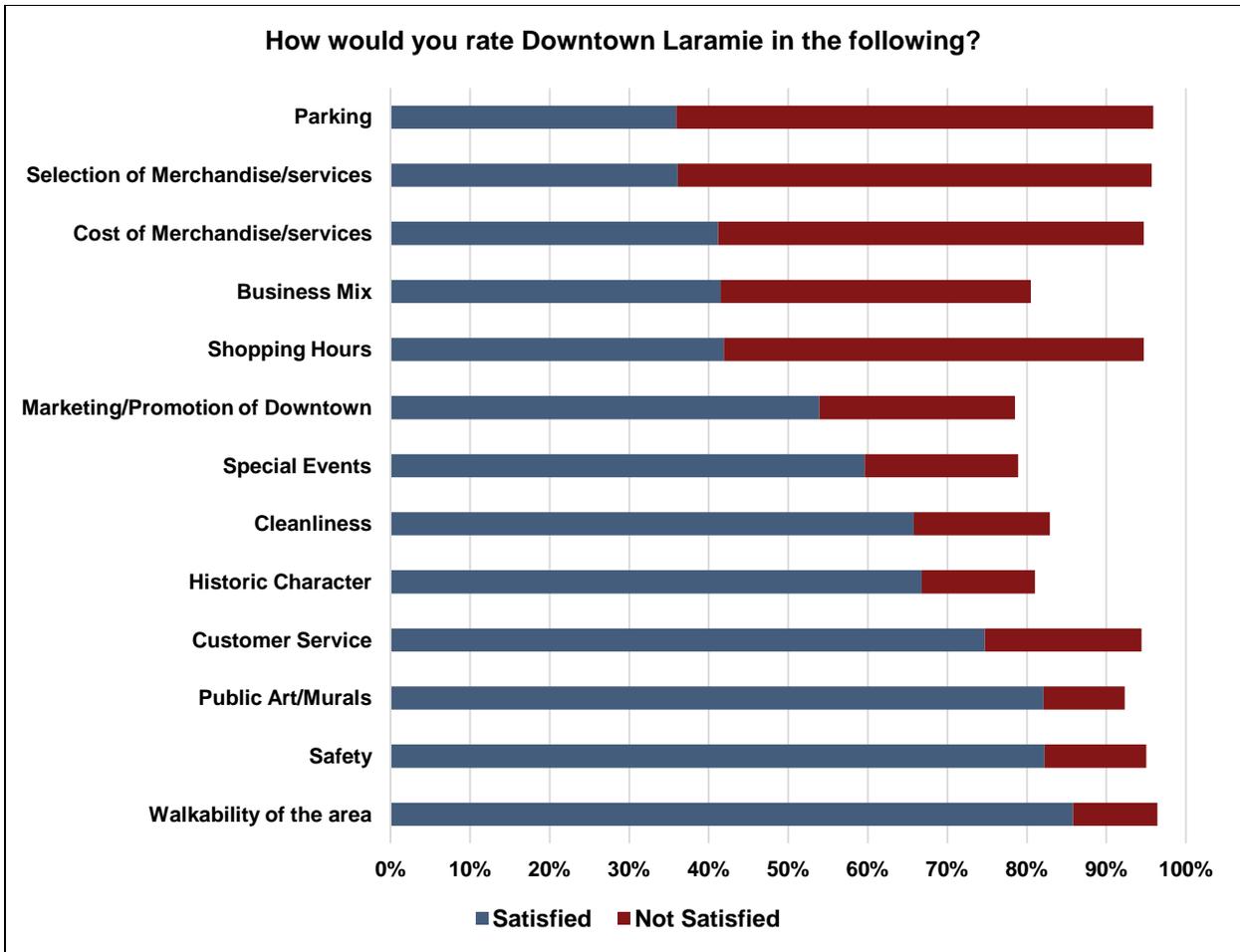
Very few of those who responded to the consumer survey report that they never come to Downtown Laramie. Interestingly, the plurality of respondents (37.3%), come to Downtown Laramie 11 or more times per month. This may have been the response from those who completed consumer surveys who also work downtown (they are therefore downtown "11 or more times per month.")



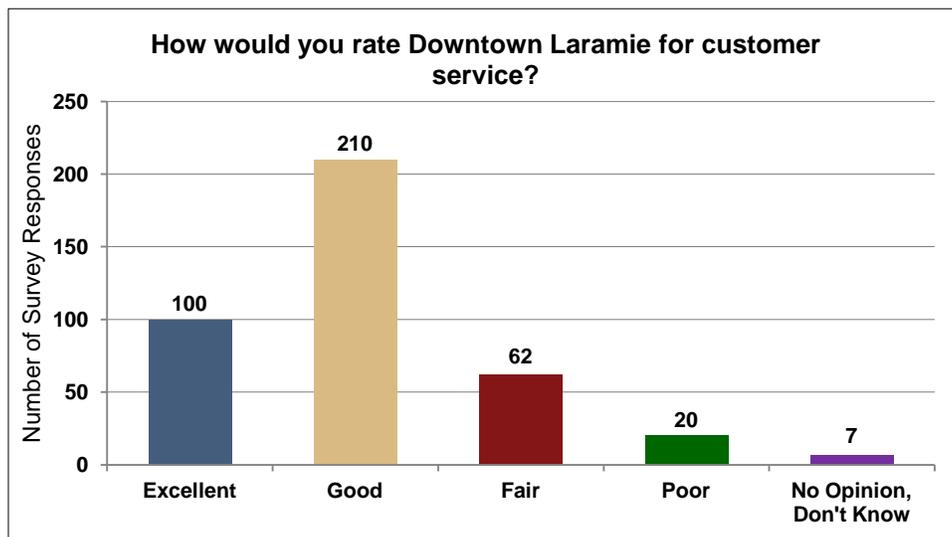
How would you rate Downtown Laramie for the following listed attributes?

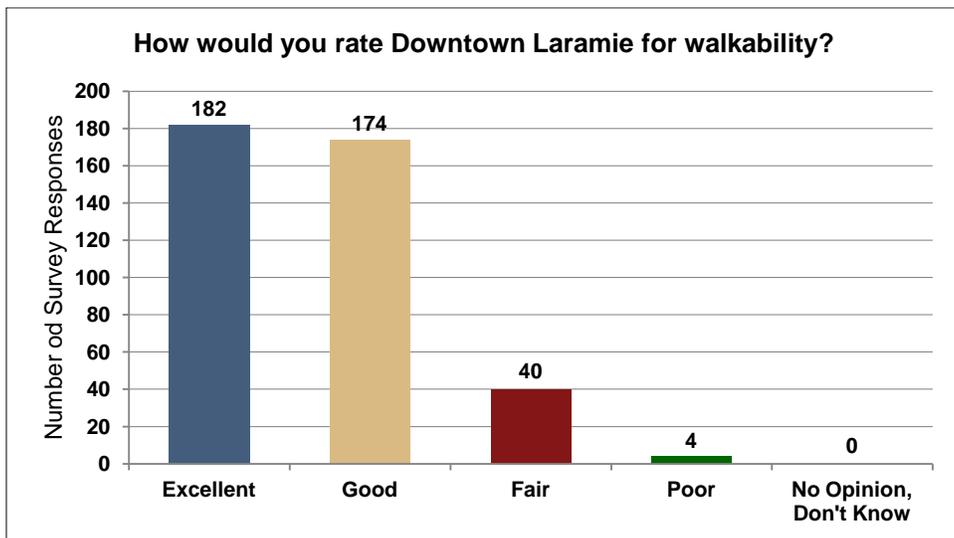
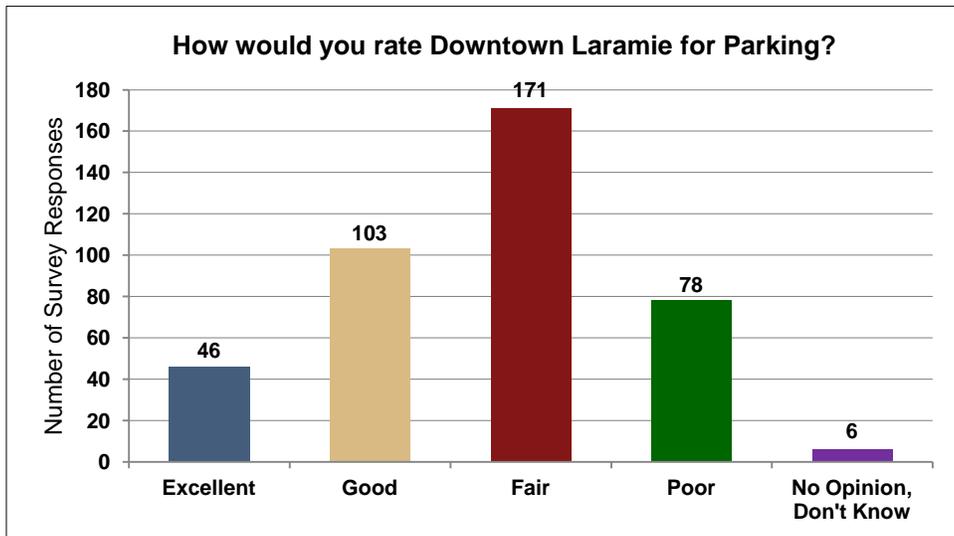
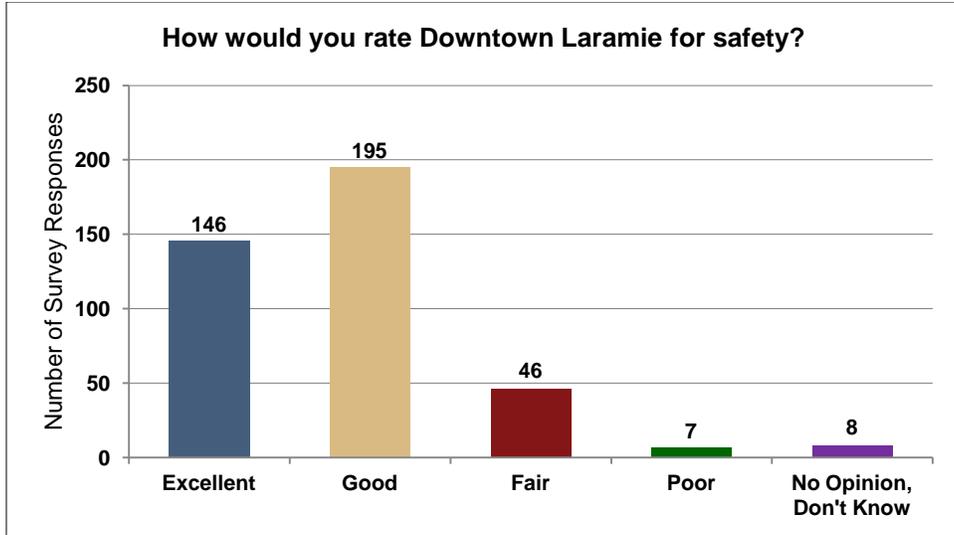


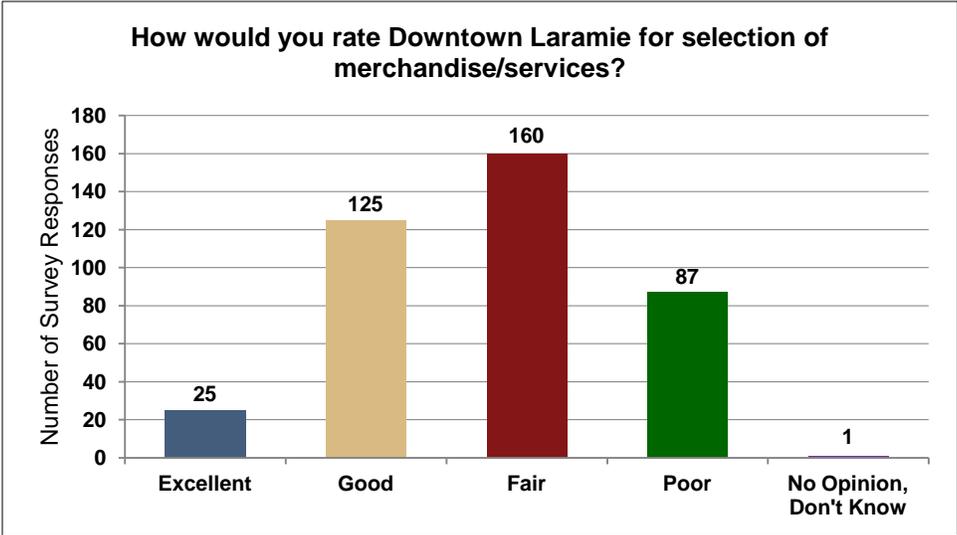
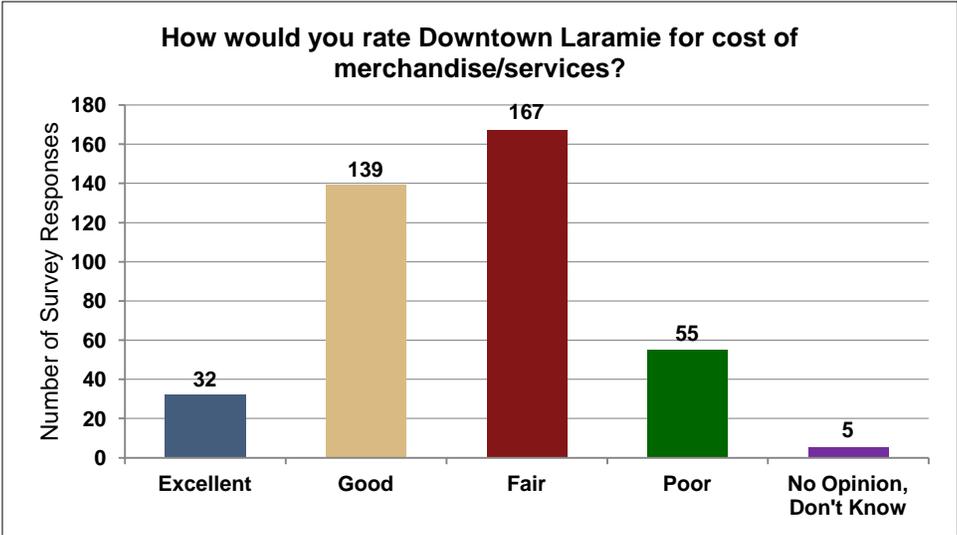
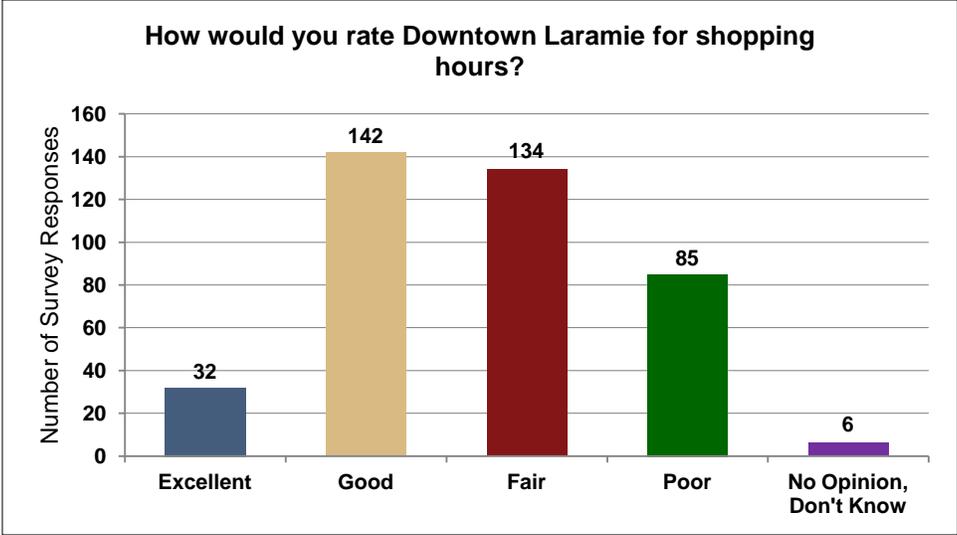
As noted in the above chart, public art/murals received high praise, followed by walkability of the area, safety, and historic character. Parking received the most "poor" to "fair" ratings, followed by shopping hours, cost of merchandise/services and selection of merchandise/services. When the "excellent" and "good" ratings are combined into a common "satisfied" rating, with "fair" and "poor" grouped into "not satisfied", the following results occur:

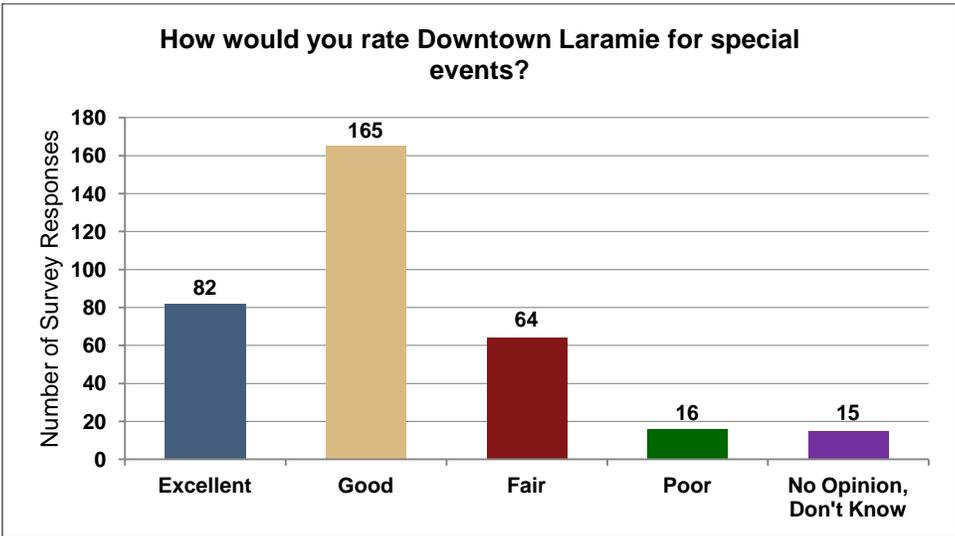
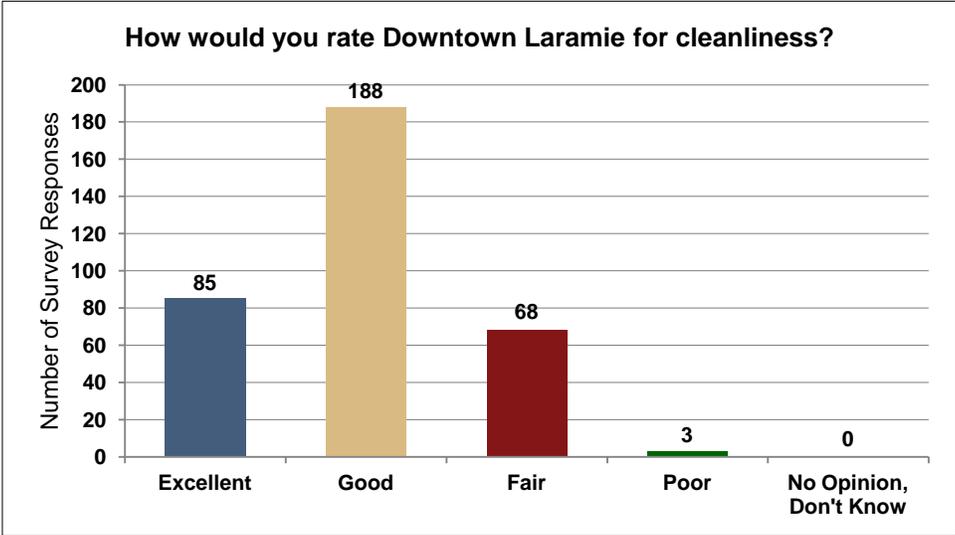
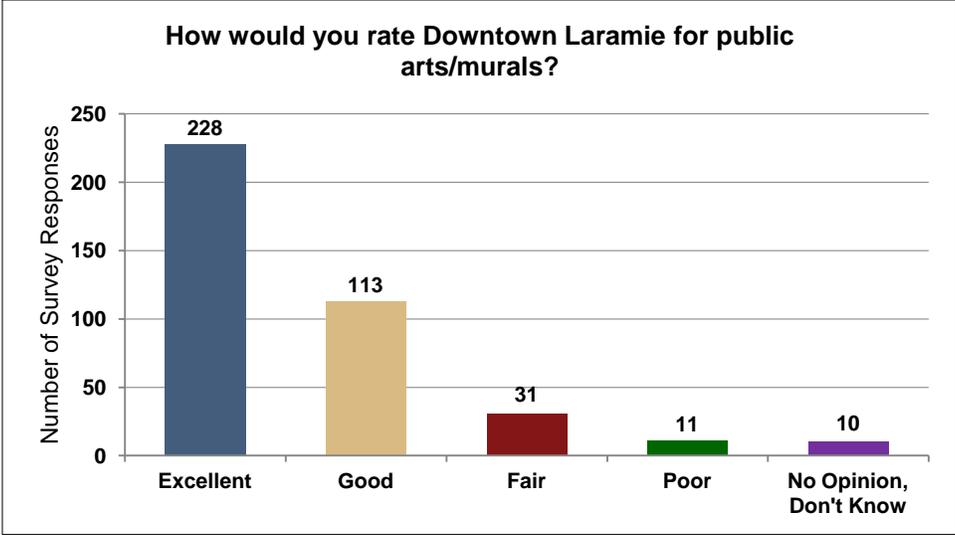


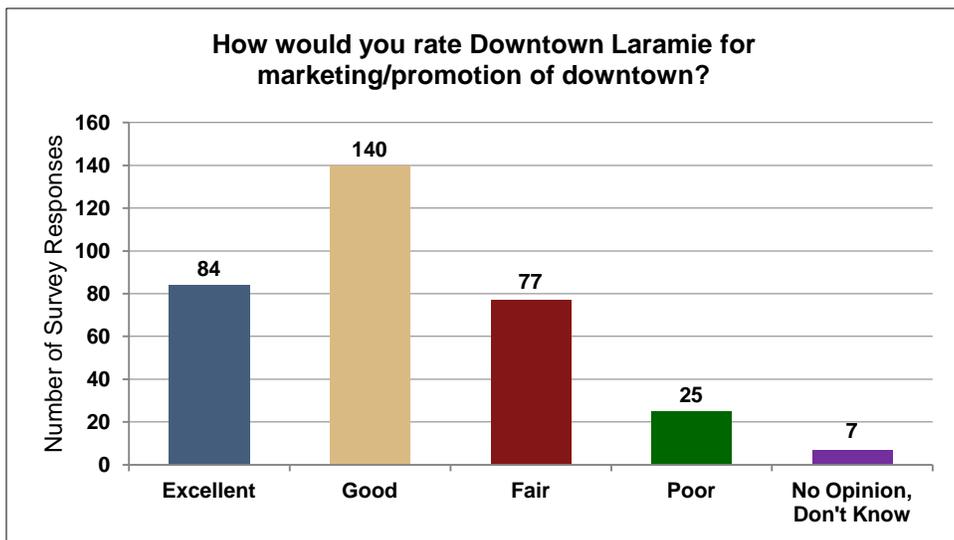
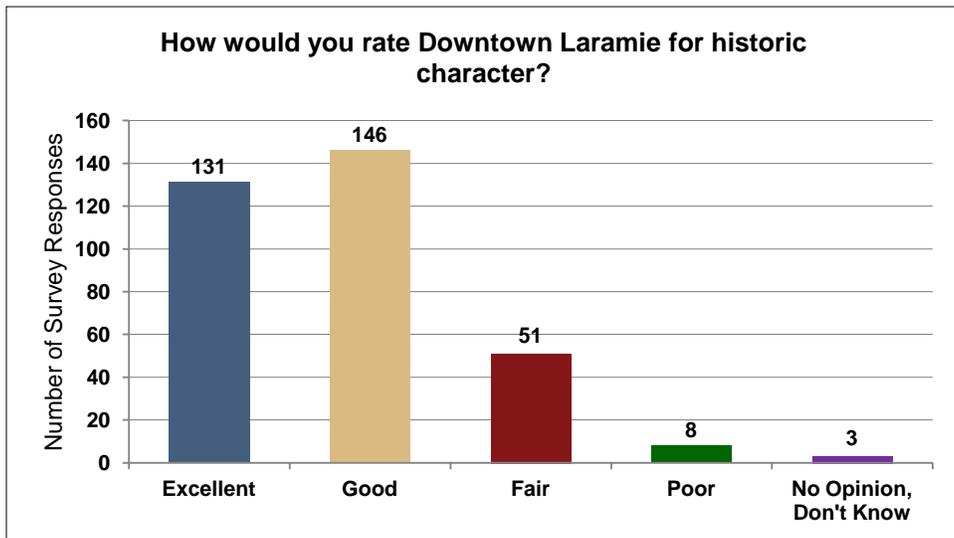
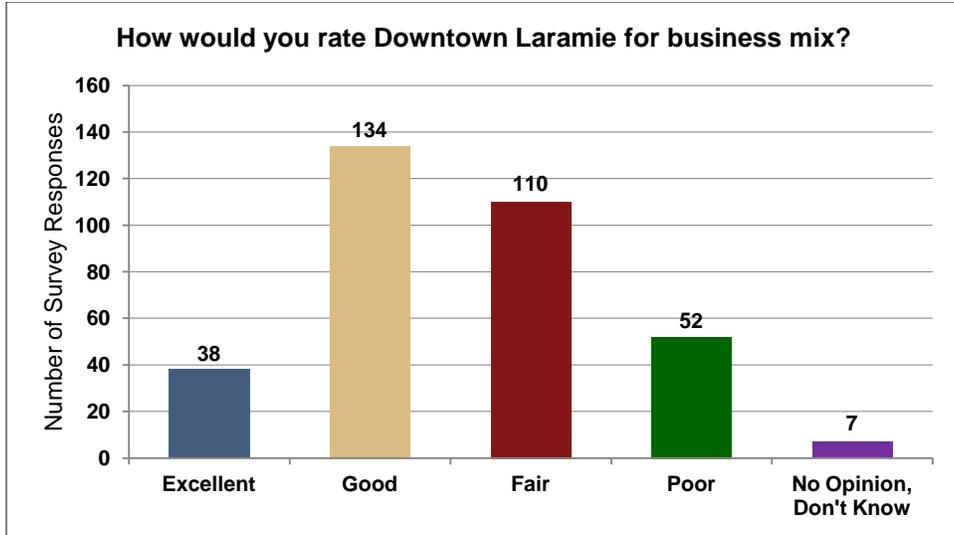
These attributes are shown in more detail by number of surveys received in the following charts:





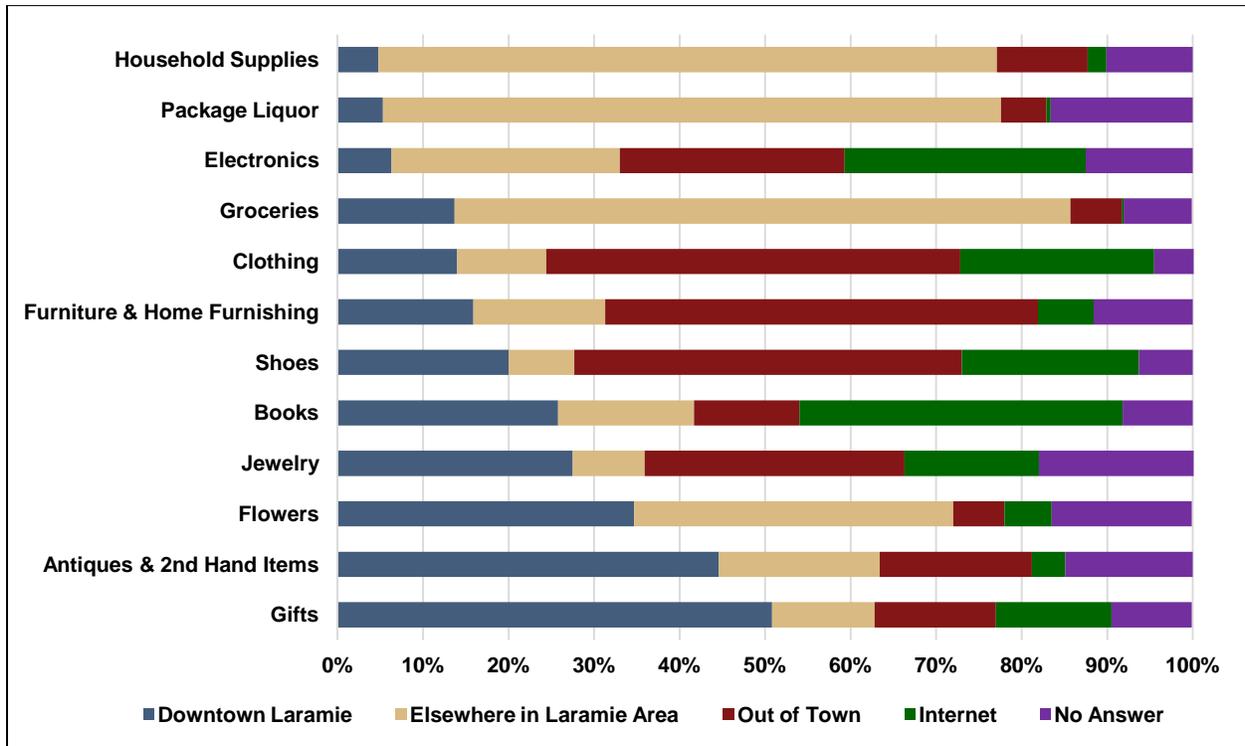




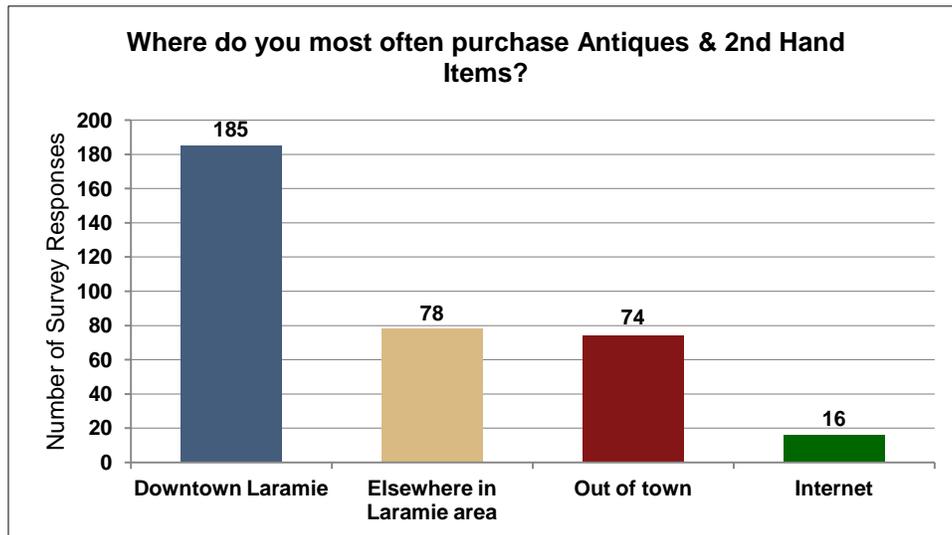


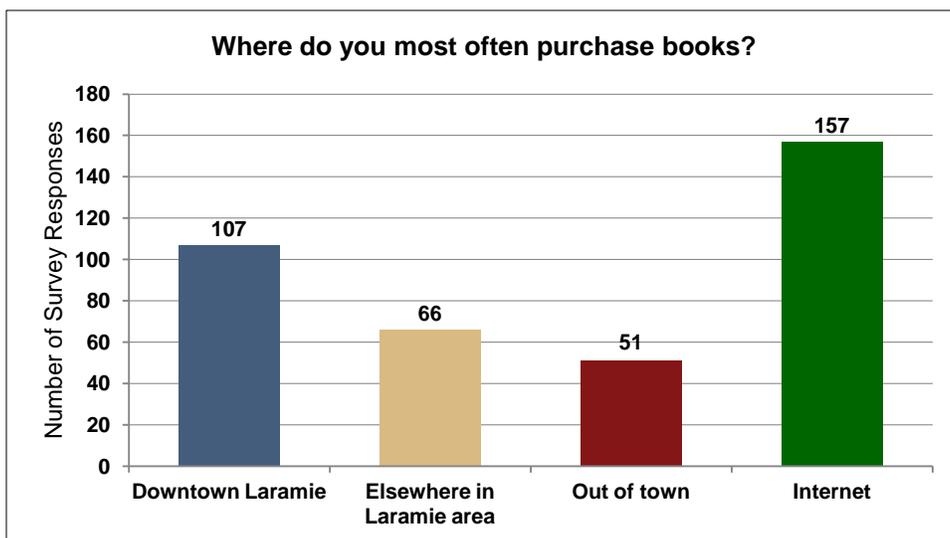
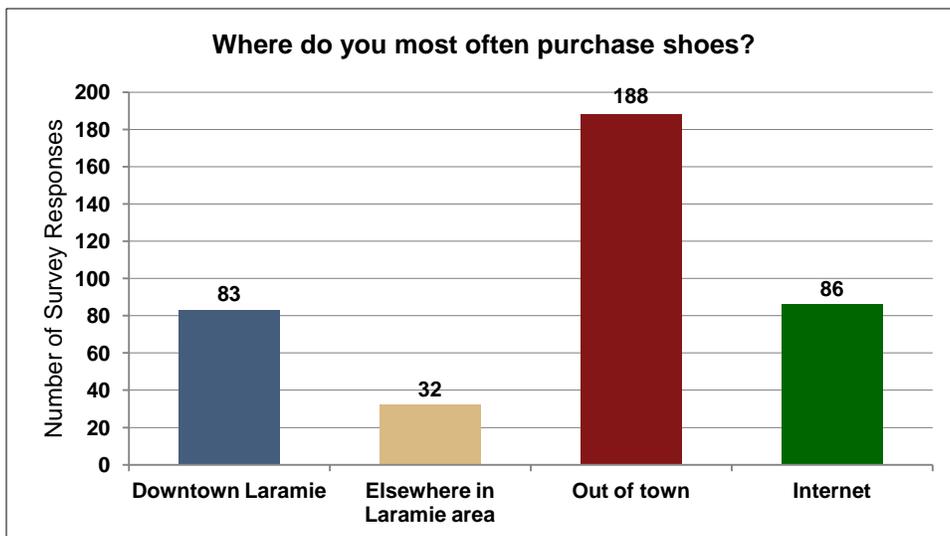
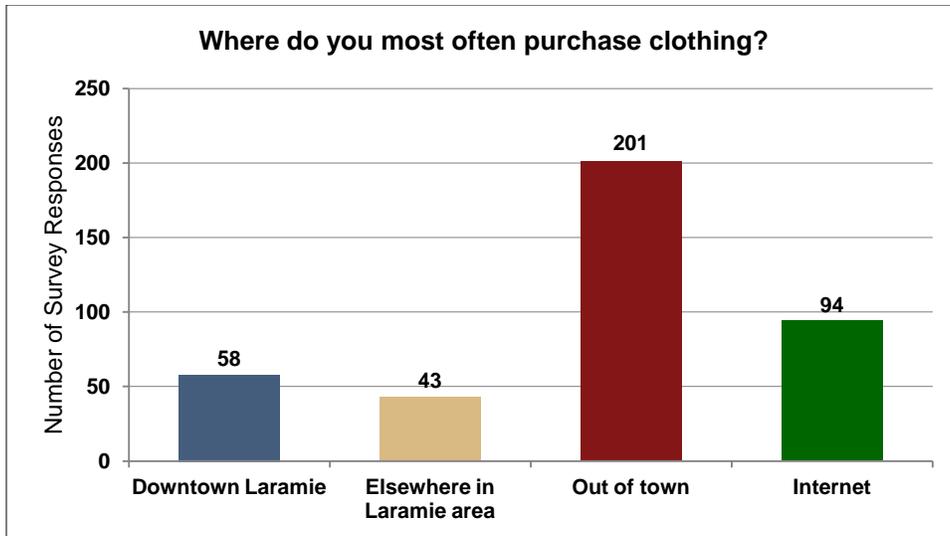
Where do you most often purchase the following? (Choose only one location)

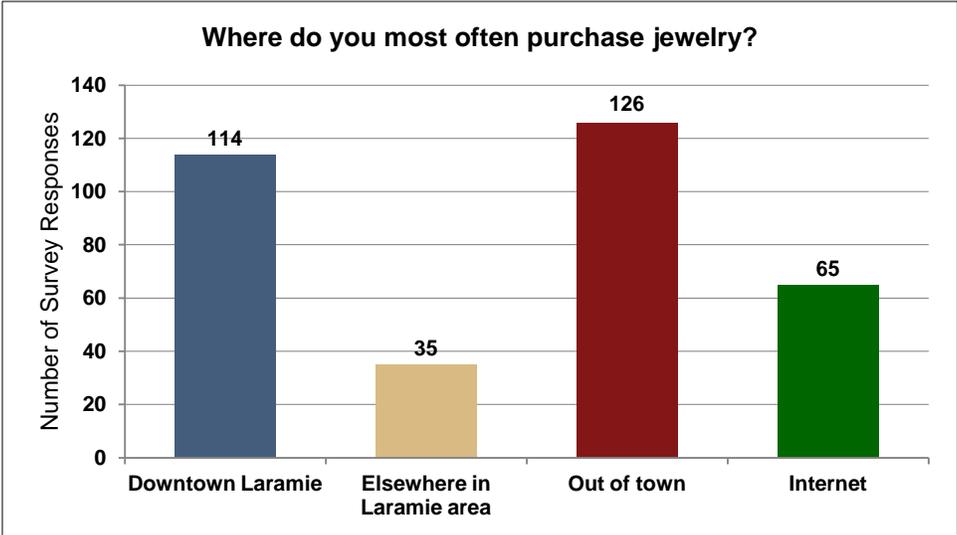
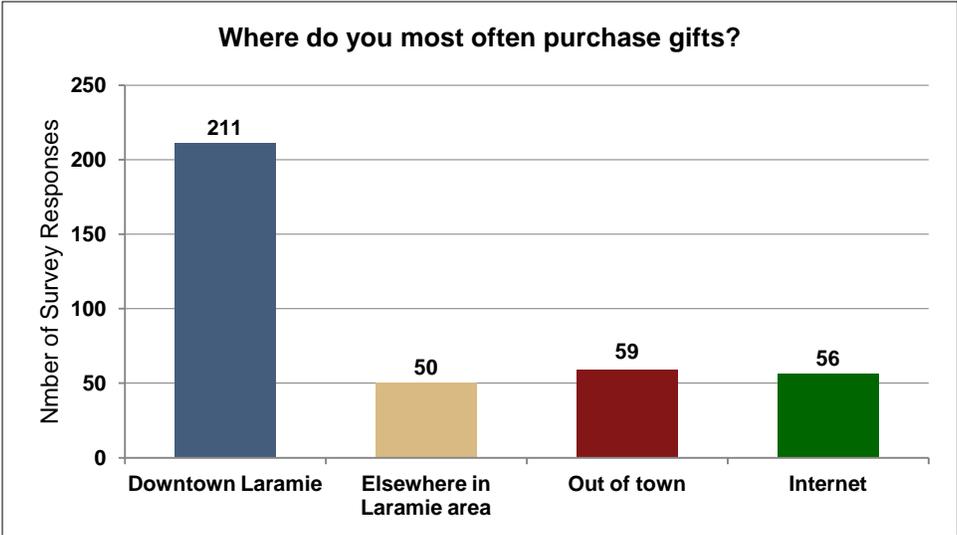
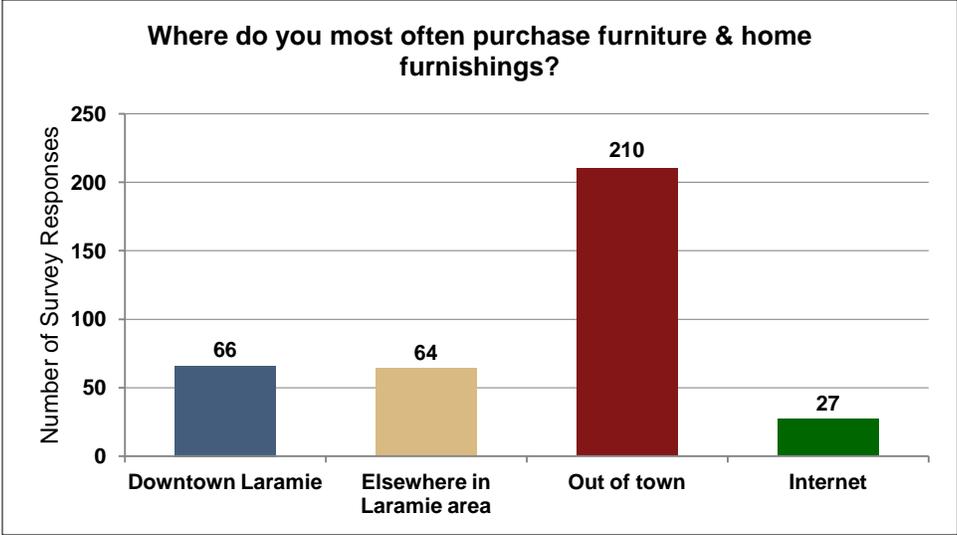
As seen in the combined chart below, gifts, antiques, and second hand items are the items most often purchased in Downtown Laramie, followed by flowers and jewelry. Shoes, furniture and home furnishings, and clothing are most often purchased out of town. Books and electronics are most often purchased over the internet. Household supplies, package liquor, and groceries are most often purchased elsewhere in Laramie.

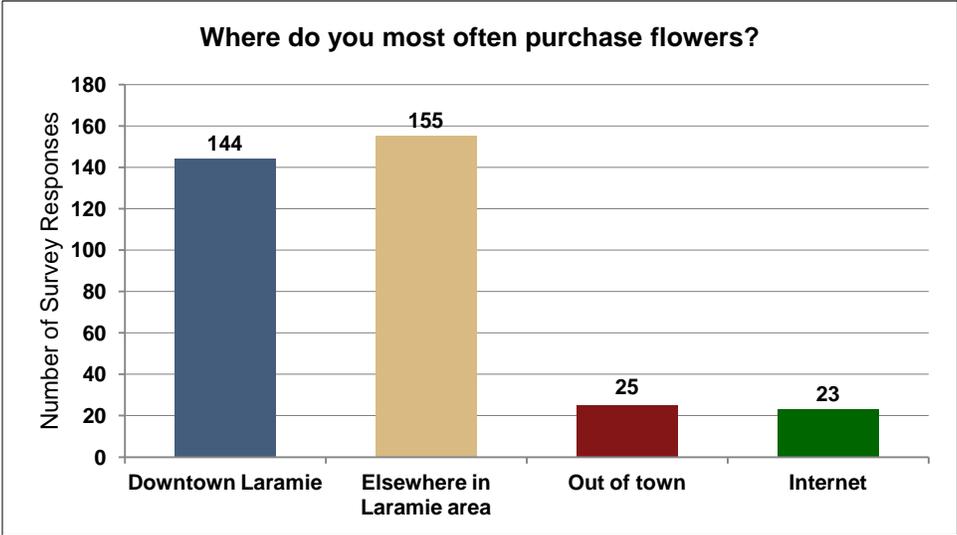
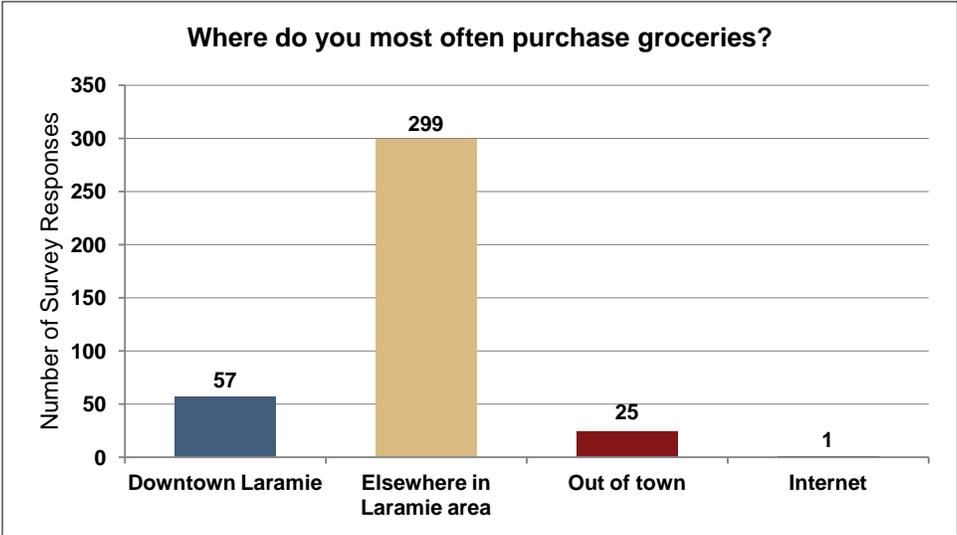
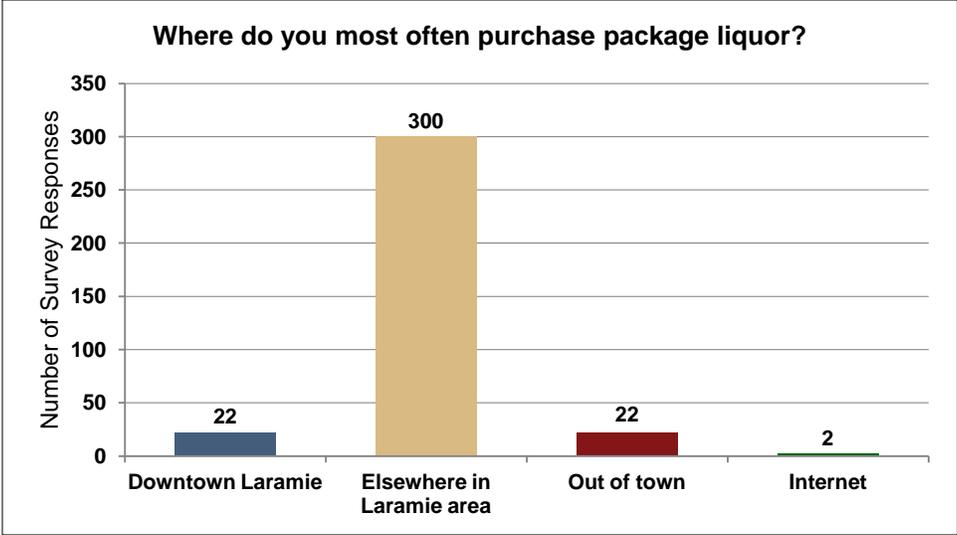


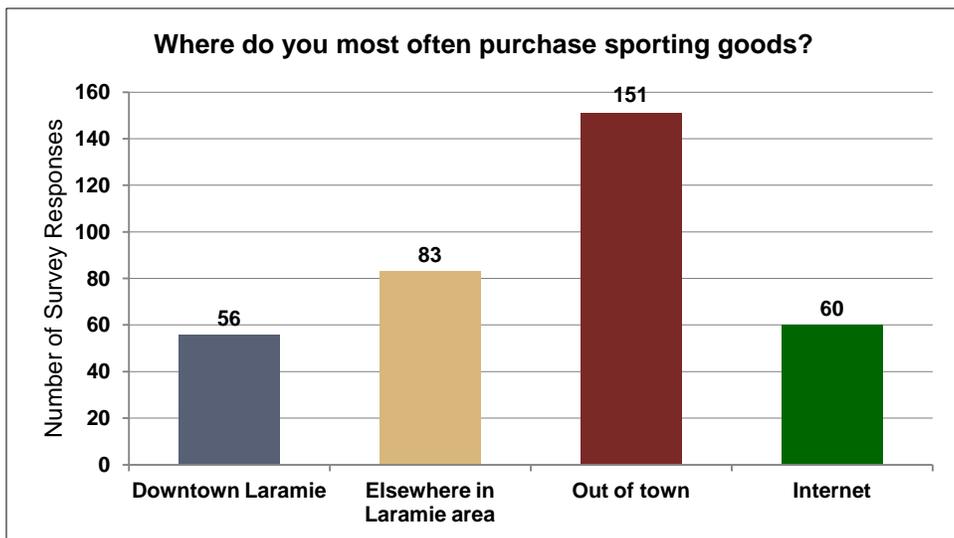
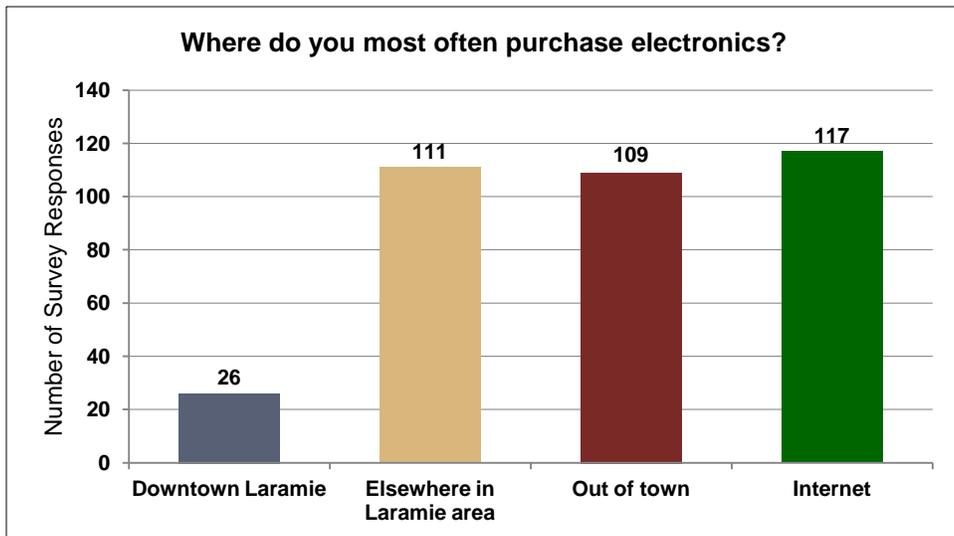
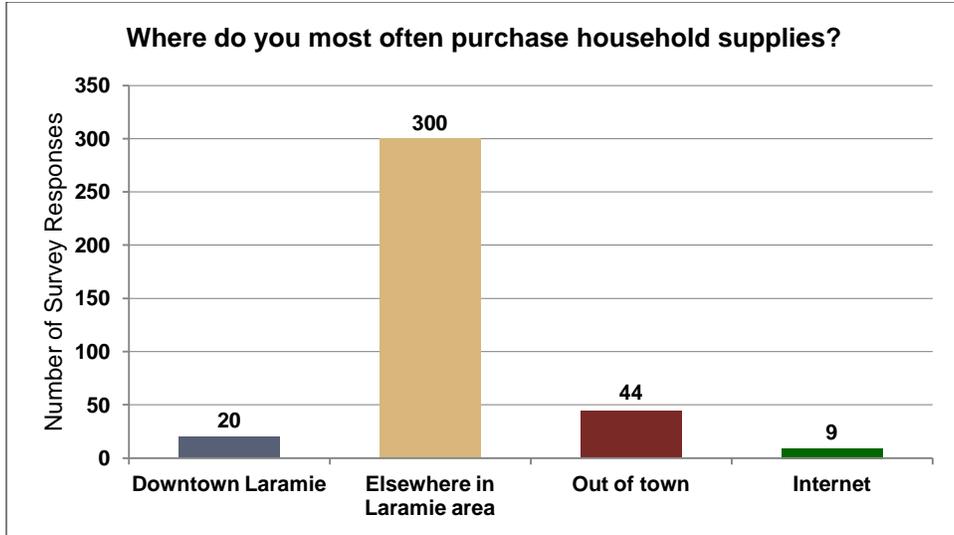
Individual charts of the above list follow.





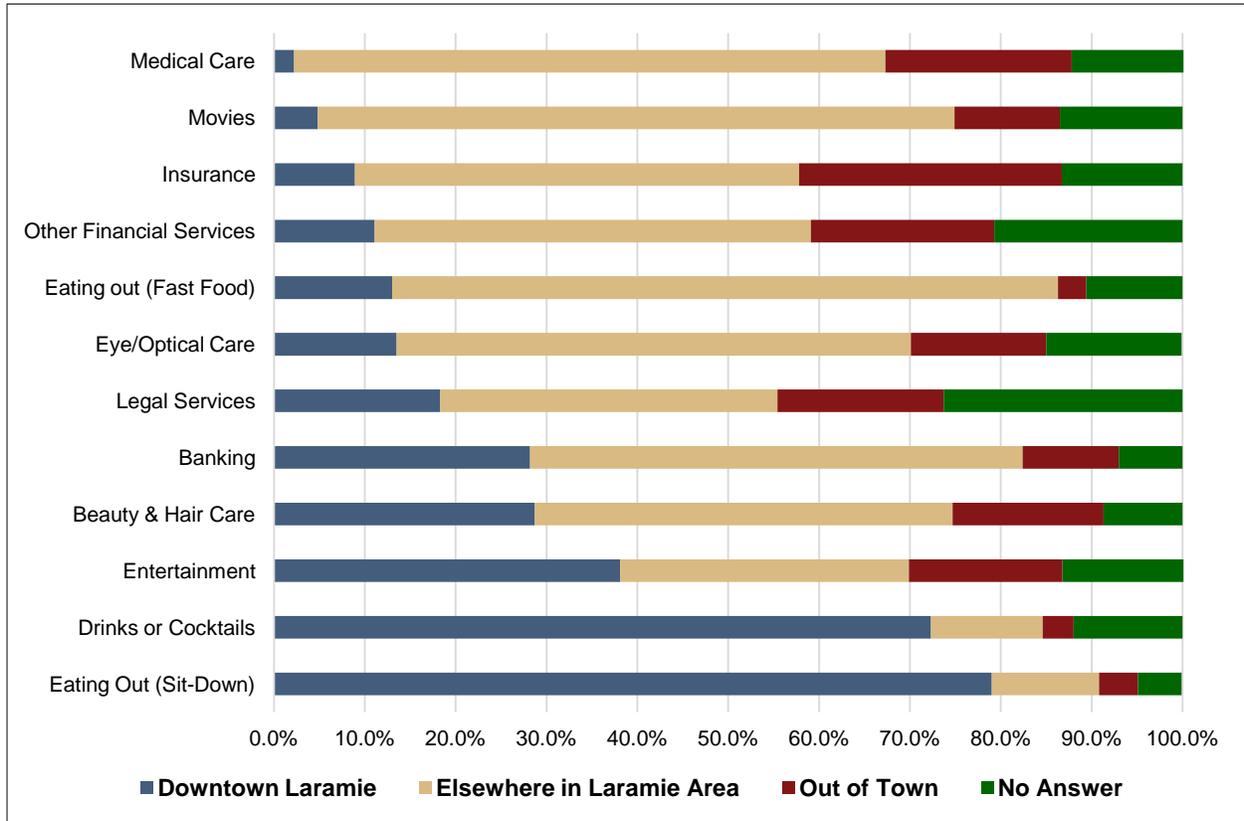




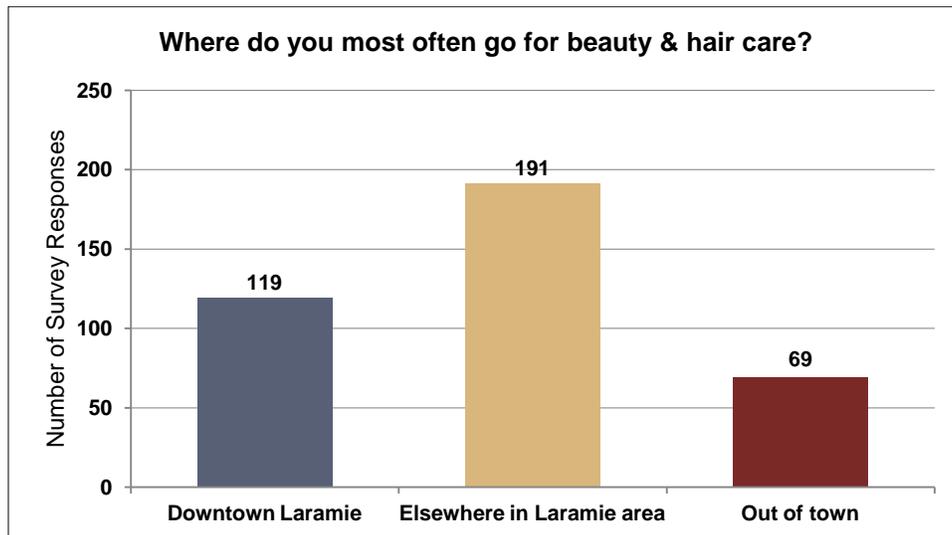


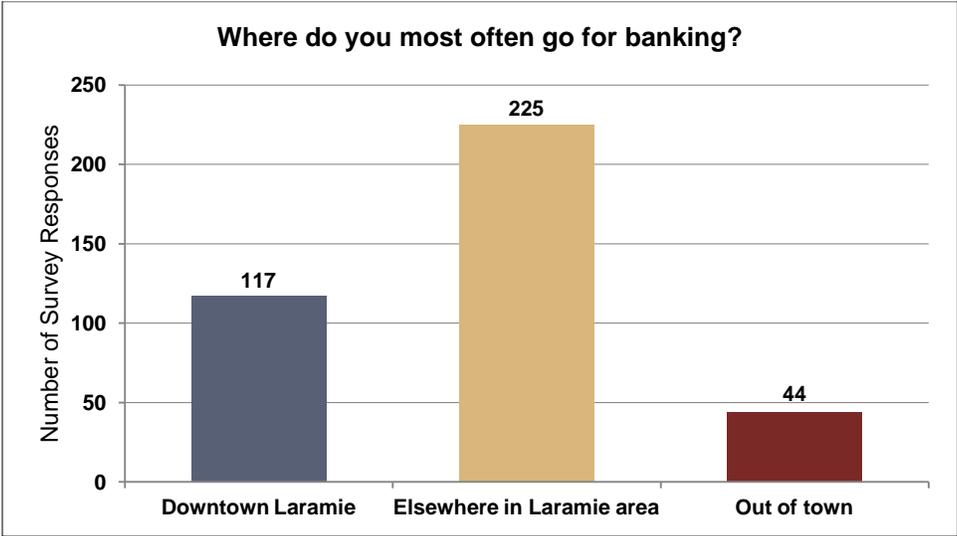
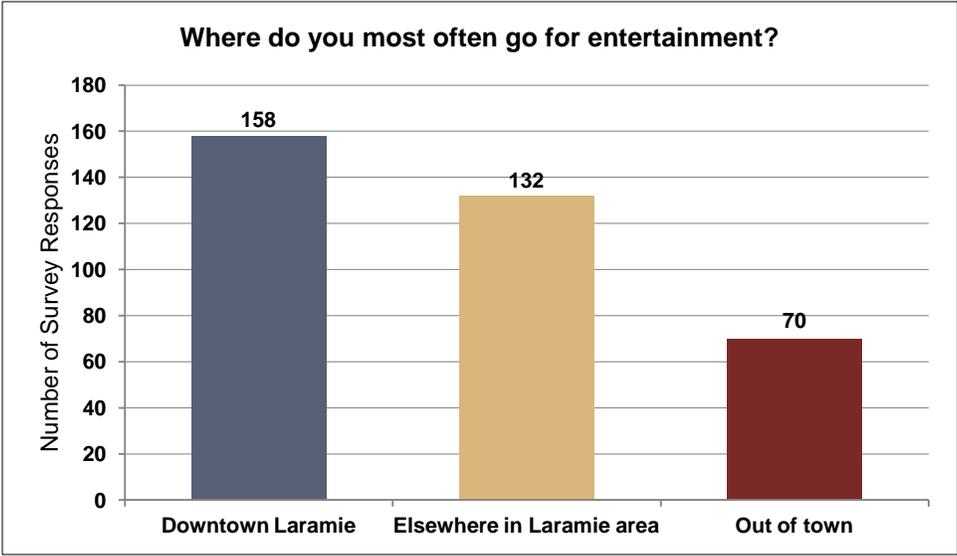
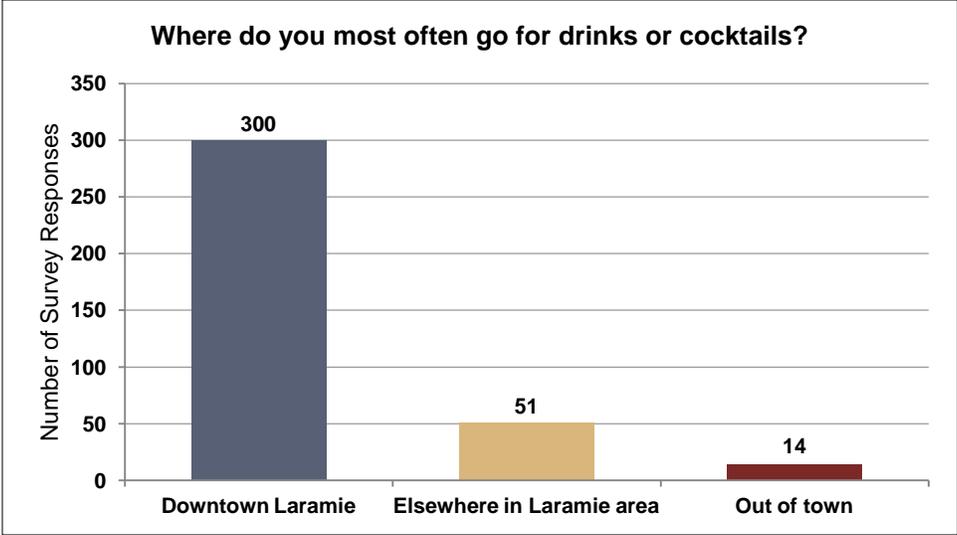
Where do you most often go for the following purposes? (Choose only one location)

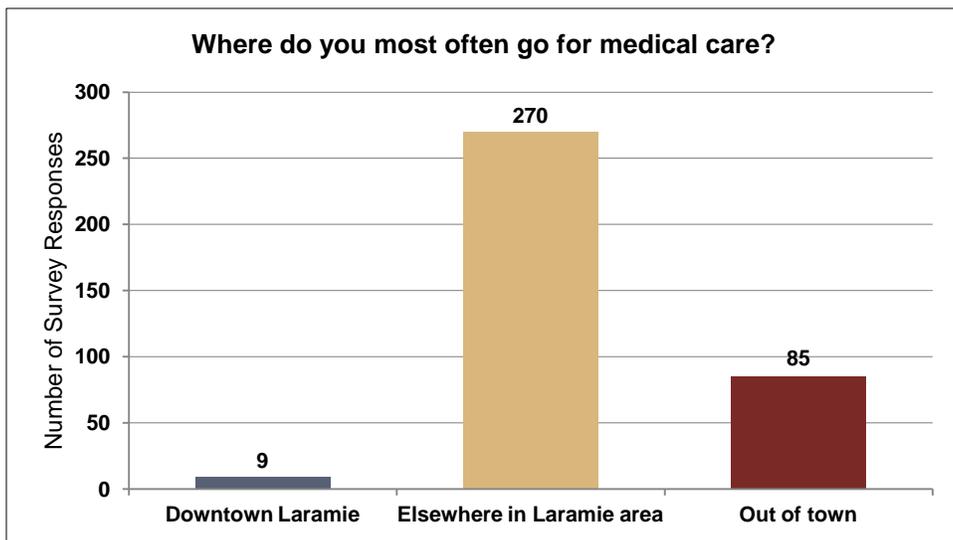
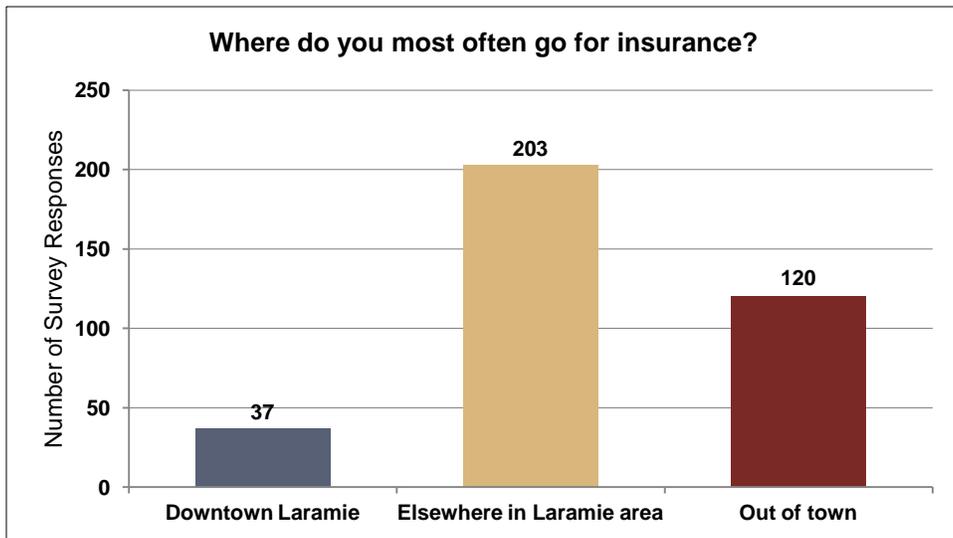
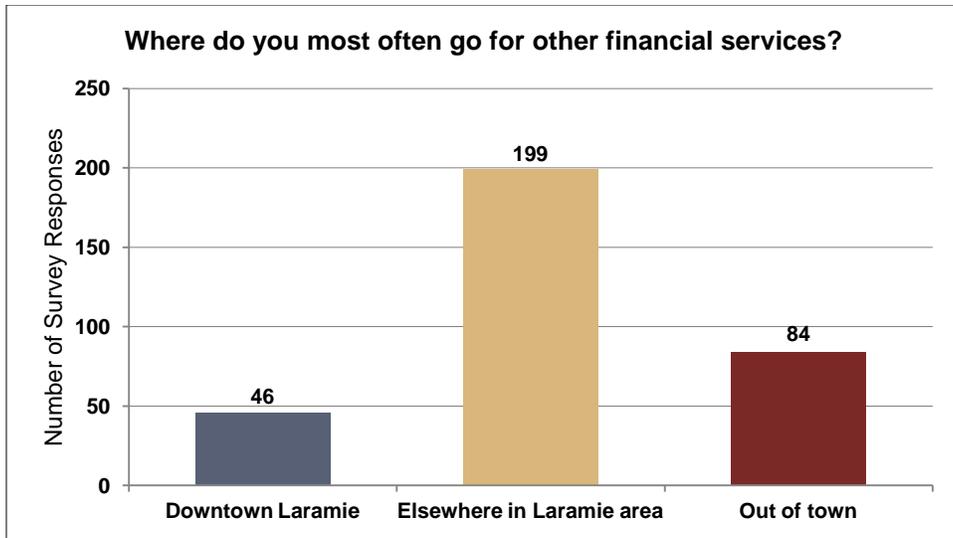
Downtown is the place to go for sit-down restaurants, drinks or cocktails. Entertainment and beauty and hair care are evenly split between downtown and elsewhere in Laramie. Fast food, movies, and medical care are most often accessed elsewhere in Laramie.

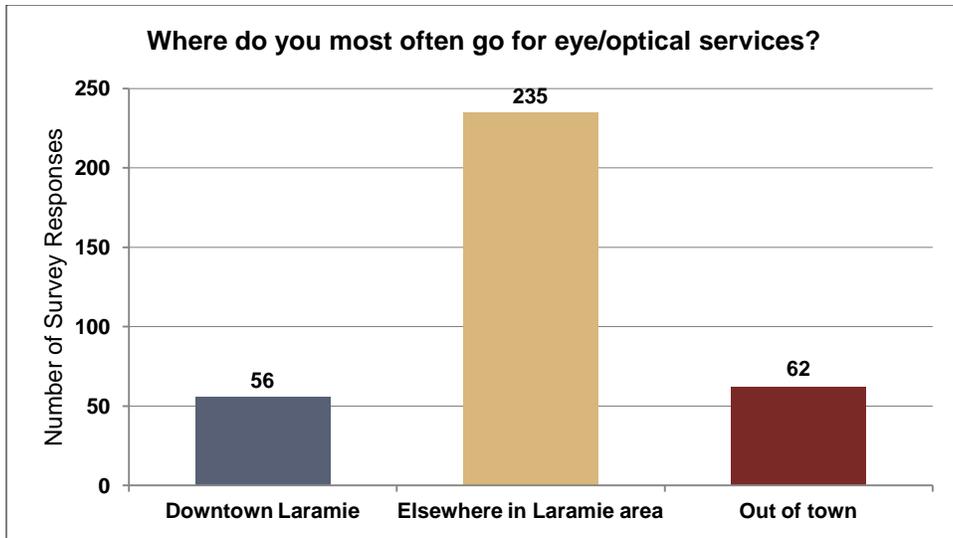


Detailed charts follow:



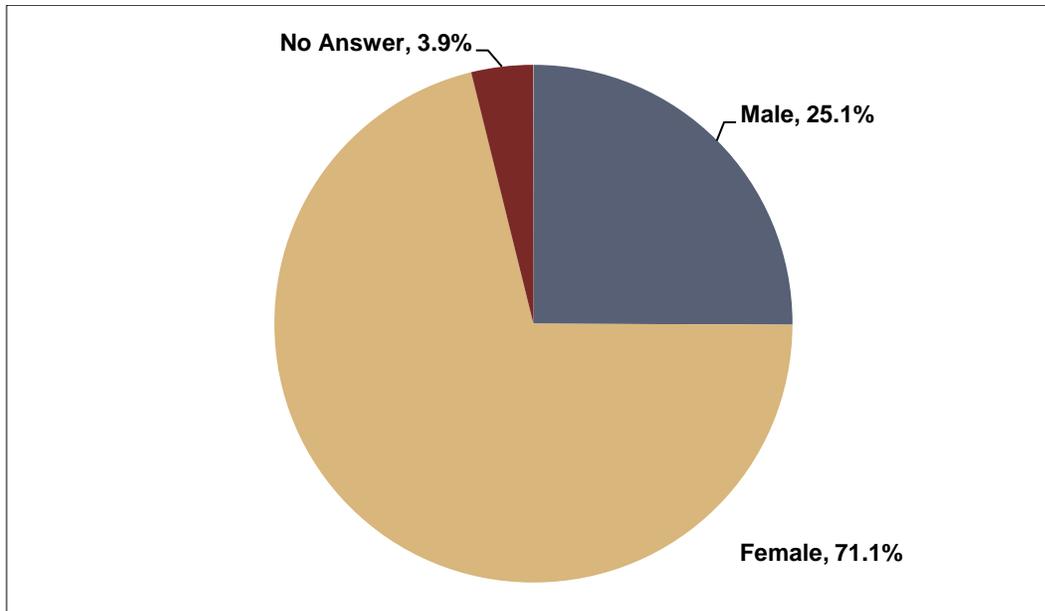






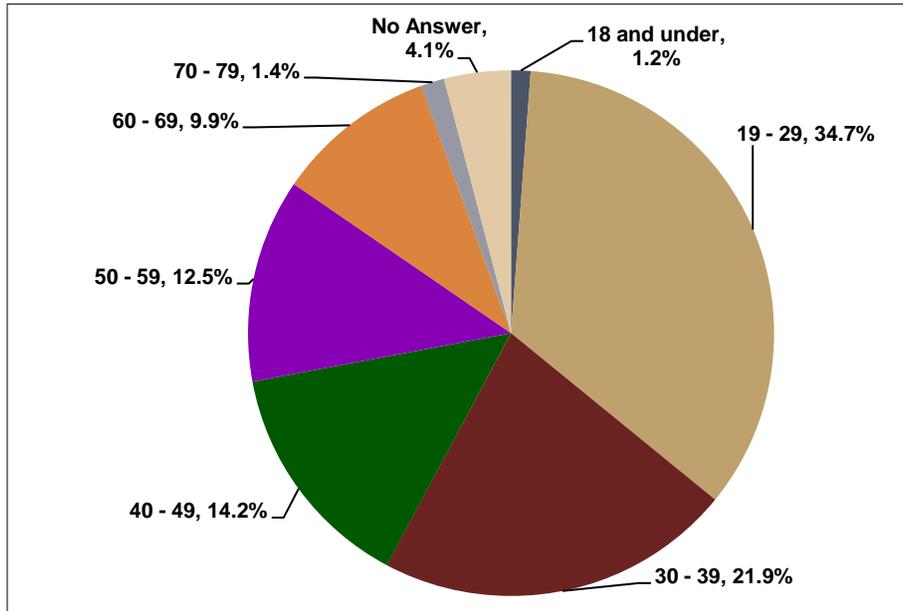
What is your gender?

Seventy-one percent (71%) of respondents were women, in keeping with typical shoppers in general.



What is your age?

Thirty-four percent (34%) of the surveyed shoppers are in the 19-29 year old range with another 22% 30-39. This is indicative of a relatively young shopping population in Downtown Laramie.



What would make you shop Downtown Laramie more often?

As evidenced by the large volume of responses to the question, “What would make you shop Downtown Laramie more often?” people want to see a thriving downtown. Of the 415 total surveys collected 340 left comments on what they would like to see in Downtown Laramie.

Overwhelmingly, the top want was for additional clothing choices (94 responses). The comments were directed at men’s clothing, professional clothing, children’s clothing, and reasonably priced clothing. Additionally, respondents said they would like to see expanded store hours, especially for those who only have evenings or weekends off, expanded parking options, and better prices. Suggestions were made to have sidewalk promotional sales, student deals, and possibly a circular with current deals and upcoming events.

Consumers of Downtown Laramie are looking for more variety as well. They would like to see more breakfast restaurant options, high-end restaurants, clothing as mentioned before, and an overall expansion in the products offered.

In summary, shoppers to Downtown Laramie enjoy the atmosphere and ambiance of the area. They are, largely, loyal consumers and are attracted by the art, the murals, the events, and the support services that make up Downtown Laramie.

Laramie's Downtown meets the definition of a National Main Street Program very well - it is the traditional center for social, cultural, and economic activity for the community. It tells residents and visitors what Laramie is and what it was, and how the past has shaped the community. It is the place of shared memory where the entire community still comes together to live, work, and play!



Appendices

- Appendix "A" - Downtown Business Survey and Detailed Responses
- Appendix "B" - Downtown Consumer Survey and Detailed Responses
- Appendix "C" - Outreach Items

Appendix "A"

Survey Given to Downtown Laramie Businesses



Downtown Business Survey

Please complete **ONLY** if you are a Downtown Laramie building/business owner, tenant or manager. You may complete the survey on-line if you wish: <http://www.surveymonkey.com/s/LaramieBizSurvey> This information will help us strengthen downtown's economic and social vitality - Please respond! It is being conducted to assist in the development of a building/business inventory for the Laramie Main Street Alliance. Individual survey responses will be kept **STRICTLY CONFIDENTIAL**, and will be compiled and summarized in statistical format by Community Builders, Inc., the consulting firm retained to prepare the inventory. Please return your completed survey by July 1, 2014 to Laramie Main Street Alliance (207 Grand Avenue), or mail to Community Builders, Inc., 873 Esterbrook Road, Douglas, Wyoming 82633.

1. Please provide a description of the goods/services you provide:

2. What year was your business established?

- | | |
|------------------------------------|--|
| <input type="checkbox"/> 2010-2014 | <input type="checkbox"/> 1970-1979 |
| <input type="checkbox"/> 2000-2009 | <input type="checkbox"/> 1960-1969 |
| <input type="checkbox"/> 1990-1999 | <input type="checkbox"/> 1959 and before |
| <input type="checkbox"/> 1980-1989 | |

3. What level of the building is your business or service located on? (Check all that apply)

- Basement
- Ground Floor
- Upper level
- Comments: _____

4. Do you own or lease the building?

- Own
- Lease
- If leased, who is the building owner? _____

5. If you own the building, is there available space in the building that could be rented or leased?

- Yes
- No
- N/A
- If yes, please describe: _____

6. Is your space adequate for your present operation?

- Yes
- No
- If no, please explain: _____

7. What is the general condition of your building?

- Excellent
- Good
- Fair
- Poor
- I don't know

8. Do you plan any significant changes in your business in the next one to two years? (Please check all that apply).

- Physical improvements (interior/exterior remodeling)
- New/expanded products, services, inventory
- Increased hours of operation
- Decreased hours of operation
- Additional employees
- Other (please specify) _____
- Downsizing, reduction in service or inventory levels
- Sale or closure of business
- Relocation
- Conversion to another use
- Not planning any changes

9. Including yourself, how many people does this business employ at this location?

- Full Time _____
- Part Time _____
- Seasonal _____

10. Do you have difficulty recruiting or retaining employees?

- Yes
- No
- If yes, please explain _____

11. In order to demonstrate the importance of the downtown district to Laramie, we need to tally the total amount of downtown sales for every business. Remember, your individual response will be kept **STRICTLY CONFIDENTIAL**. What is the total amount of sales your business generated in 2013? _____

12. Compared to your 2013 sales, what are you expecting for 2014 sales?

- Much higher sales
- Slightly higher sales
- Same level of sales
- Slightly lower sales
- Much lower sales
- Comments: _____

13. What time of day do you generally open?

	Before 8 am	8-10 am	10-noon	Noon- 2 pm	2-4pm	4-6 pm	After 6 pm	Not open
Monday								
Tuesday								
Wednesday								
Thursday								
Friday								
Saturday								
Sunday								

Other (please specify) _____

14. What time of day do you generally close?

	5 - 6 pm	6-8 pm	8-10 pm	10-midnight	Midnight-2am	After 2am	Not open
Monday							
Tuesday							
Wednesday							
Thursday							
Friday							
Saturday							
Sunday							

Other (please specify) _____

15. Where are the majority of your customers located? (Check all that apply)

- Within Laramie
- Campus population
- State-wide
- Don't know
- Within Albany County
- Out of state
- Internet sales

16. Where are the majority of your competitors located? (Check all that apply)

- Within Laramie
- State-wide
- Out of state
- Don't know
- Within Albany County
- Ft. Collins or Cheyenne
- Internet sales

17. Where are your suppliers (the wholesalers and others who sell products to you for resale) located? (Check all that apply)
- Within Laramie
 - State-wide
 - Out of state
 - Other (please specify) _____
 - Within Albany County
 - Ft. Collins or Cheyenne
 - Internet sales

18. What are the major issues or obstacles facing your business today?

19. What are the major assets and benefits that help your business?

20. How would you rate Downtown Laramie for the following?

	Excellent	Good	Fair	Poor	No Opinion/Don't Know
Safety					
Parking					
Walkability of the area					
Shopping Hours					
Public Art/Murals					
Cleanliness					
Special Events					
Business Mix					
Historic Character					
Marketing/Promotion (of itself)					

21. Please indicate which type of promotion or advertising you use and rate its effectiveness in marketing your business.

	Excellent	Good	Fair	Poor	Do not use
Internet/website					
Social media (Facebook, Twitter, Instagram, Pinterest, Linked In, etc.)					
Electronic Newsletters (i.e. Constant Contact)					
Local Newspaper					
Regional Newspaper					
Radio					
Direct Mail					
Billboards					
Word of Mouth					
Other _____					

22. Are you aware of the Laramie Main Street Alliance?

- No
- Yes

23. If yes, have you used any of their programs or services? (Check all that apply)

- Business Coaching
- Website linkage
- Monthly E-Newsletter
- Cross promotion on Main Street social media feeds
- Assistance with design and property improvements (Façade Grant)
- Technical Assistance & training workshops
- For Rent or Sale property listing
- Help navigating City permits
- Special events; activities
- None
- Not Applicable

24. How can the Laramie Main Street Alliance better serve you?

25. Please provide your contact information. This information will be entered into our database only and NOT linked to your individual survey response. **All respondents will be entered in weekly drawings for prizes donated by downtown merchants. GRAND PRIZE at end of survey! \$100 gift certificate donated by Big Hollow Food Coop.**

Your Name:

Your Position:

Business Name:

Business Street Address:

Mailing Address:

Phone:

Email:

Website:

Facebook:

Detailed Responses to Each Question of the Retail Survey, Including Detailed Responses to Open-Ended Questions

What year was your business established?		
Answer Options	Response Percent	Response Count
2010-2014	20.0%	19
2000-2009	30.5%	29
1990-1999	23.2%	22
1980-1989	7.4%	7
1970-1979	4.2%	4
1960-1969	3.2%	3
1959 and before	11.6%	11
<i>answered question</i>		95
<i>skipped question</i>		4

What level of the building is your business or service located on? (Check all that apply)		
Answer Options	Response Percent	Response Count
Basement	16.2%	16
Ground Floor	92.9%	92
Upper level	24.2%	24
Comments:		6
<i>answered question</i>		99
<i>skipped question</i>		0

design in basement, coolers in basement, retail on ground floor
2nd Story Building
Real Estate/upstairs is a 2 bedroom apt
We are the only business in our building
2 story house
Back Garage (no store front)

Do you own or lease the building where your business is located?		
Answer Options	Response Percent	Response Count
Own	48.0%	47
Lease	52.0%	51
If leased, who is the building owner?		39
<i>answered question</i>		98

Jenny Chambers
Falcon Tech
Jeanne Chambers
Martindale's Properties
Ryan Bolton
Richard Maricopa
Marion Griffin
Ryan Bolton - Bolt, LLC
Bob Needles
Jay Deveraux
Ken Reynolds
Mel Zenoni
ed and christie anderson
Bolt LLC (Ryan Bolt)
Ryan Bolton
Episcopal Diocese of Wyoming
Brett Glass
Nighthouse Properties
Sturm Leasing
Catherine Mealey
Ray Olson
Andersons
Nick Murdock
Jeff Young
Catherine Mealey
We are buying from a third party.
Merlin Ventures, LLC
Karen Voight
martindale's
sean hart
Jim Heur is property mgr
Karen Valentine
Karen Valentine
Rented space
Ryan Bolt
Rich Arbour
O'dell Enterprises
Connor center
Anderson's

If you own the building, is there available space in the building that could be rented or leased?

Answer Options	Response Percent	Response Count
Yes	25.6%	23
No	34.4%	31
N/A	40.0%	36
If yes, please describe:		15
<i>answered question</i>		90
<i>skipped question</i>		9

Restaurant already leased
basement for art development
Upstairs apartment is currently rented
already rented
Currently rented. Jays hair salon.
Apartment upstairs
I have stuff in the space, but could remove it.
Art Gallery or professional office
We lease out part of 2nd floor to a law firm
Office suites rented on the 2nd floor
Upper level is available for rentals
Office space.
But it is unfinished at this time.
3 individual offices, approximately 100 Sq Ft. per with a reception area, conference room and two restrooms. Utilities and cleaning of common area included.
Abandoned 1000SF upper level that requires complete remodel.

Is your space adequate for your present operation?

Answer Options	Response Percent	Response Count
Yes	88.9%	88
No	11.1%	11
If no, please explain:		7
<i>answered question</i>		99
<i>skipped question</i>		0

we do need more room
We outgrew years ago.
Need off street parking
Need more seating and kitchen space
too small
we could use more space for people to gather and hang out
Yes and no. We are in a desperate process of making renovations to prevent any potential damage to our merchandise by a nearby coffee roasting business that will be established in the next few weeks.

What is the general condition of your building?

Answer Options	Response Percent	Response Count
Excellent	22.2%	22
Good	56.6%	56
Fair	17.2%	17
Poor	2.0%	2
I don't know	2.0%	2
Comments:		10
<i>answered question</i>		99
<i>skipped question</i>		0

The apartment upstairs is in good condition, but I feel if we would spend just a little bit we could raise the rent.
Total renovation in 2001
Excellent considering its age.
recent remodel
Heating System. Owner will not invest in a normal heating system for 1000 sq feet. We only have 2 electrical baseboards, versus forced hot air. I run space heaters but it trips the breakers. Frustrating...
ALLEY NEEDS FIXED WATER DAMAGE. If downtown Laramie is historical please give good consideration in contacting the city to fix the alley properly. Not with patching the alley, but cement and proper drainage.
Jim has made some great improvements and built a lab downstairs for our e-liquid manufacture.
One is recently renovated, the other needs some outside renovation.
Dated. Needs paint and carpet.
The condition of our building is excellent considering its age (~1890), however major updates and restoration is needed to make it both water and airtight.

Do you plan any significant changes in your business in the next one to two years? Please check all that apply.

Answer Options	Response Percent	Response Count
Physical improvements (interior/exterior remodeling)	39.8%	37
New/expanded products, services, inventory	35.5%	33
Additional employees	28.0%	26
Increased hours of operation	16.1%	15
Decreased hours of operation	4.3%	4
Sale or closure of business	4.3%	4
Relocation	4.3%	4
Conversion to another use	3.2%	3
Downsizing, reduction in service or inventory levels	0.0%	0
Not planning any changes	33.3%	31
Other (please specify)		6
<i>answered question</i>		93
<i>skipped question</i>		6

Possible relocation.
Upgrade apartment when current tenant vacates
All of this depends on how our cash flow turns out over the next year.
Possibly sale of business

We will be updating the exterior signage
possible additional location

Including yourself, how many employees does this business employ at this location?		
Answer Options	Response Percent	Response Count
Full-time	89.7%	87
Part-time	69.1%	67
Seasonal	17.5%	17
<i>answered question</i>		97
<i>skipped question</i>		2

Do you have difficulty recruiting or retaining employees?		
Answer Options	Response Percent	Response Count
Yes	19.4%	19
No	80.6%	79
If yes, please explain		21
<i>answered question</i>		98
<i>skipped question</i>		1

It is a college town, so you must expect turnover
Recruiting statisticians in Wyoming has been tough
People move away from Laramie
Employees(1)others are self-employed(see above)
not an adequate amount of applications for open positions
Pay \$12 per hour for untrained staff but want more money
New generation doesn't want to work.
We rely on volunteers and community service workers also.
College aged employees aren't always the most reliable, consistent employee base.
Non-student labor pool is very small
It is difficult to find GOOD people to hire, but we have no problem retaining them once we find them.
none qualified, so I don't bother
Students are the main source. I have them for 2-3 years at most
sometimes, hard to find dedicated employees
Today's generation tells us when they can work.
quality of applicant pool is dismal at times
Recently there has been a lot of turn over of staff.
part time employees are almost ALWAYS on their way somewhere else
Experienced labor is difficult to find in Laramie
We have had high turnover in retail staff for store front operations.
Employee needs to be able to knit and crochet

11. In order to demonstrate the importance of the downtown district to Laramie, we need to tally the total amount of downtown sales for every business. Remember, your individual response will be kept STRICTLY CONFIDENTIAL. What is the total amount of sales your business generated in 2013?

Answer Options	Response Count
	\$ 74
<i>answered question</i>	\$ 74
<i>skipped question</i>	\$ 25

\$ 300,000
\$ 62,000
We do not have these numbers for just the Laramie office
\$ 180,000
not sure
\$ 950,000
\$ 486,000
\$ 308,000
\$ 19,000,000
\$ 25,000
\$ 420,000
\$ 120,000
\$ 14,000
\$ 30,000
\$ 45,000
\$ 150,000
I'm surprised this question would be asked. Sorry, confidential
n/a
\$ 1,700,000
\$ 1,127,000
\$ 275,000
\$ 250,000
\$ 200,000
\$ 1,000,000
\$ 69,000
\$ 200,000
\$ -
\$ 20,000
\$ 350,000
\$ 60,000
\$ 300,000
\$ 2,350
\$ 300,000
very little
n/a

\$ 1,500,000
\$ 267,500
\$ 157,000
\$ 1,800,000
\$ 350,000
\$ 35,000
\$ 80,000
\$ 450,000
\$ 16,000
not that kind of business
\$ 110,000
\$ 400,000
\$ 68,000
\$ 1,200,000
\$ 1,000,000
\$ 2,600,000
\$ 180,000
\$ 2,000,000
\$ 806,798
\$ (520,000)
Prefer not to respond.
none
\$ 23,000
\$ 450,000
\$ 285,000
\$ 285,000
\$ 35,000
\$ 1,000,000
\$ 2,000,000
N/A
\$ 70,000
\$ 200,000
\$ 3,000
\$ 300,000
\$ 10,000
\$ 350,000
\$ 150,000
\$ 100,000
\$ 60,000

Compared to your 2013 sales, what are you expecting for 2014 sales?

Answer Options	Response Percent	Response Count
Much higher sales	18.2%	16
Slightly higher sales	50.0%	44
Same level of sales	18.2%	16

Slightly lower sales	9.1%	8
Much lower sales	4.5%	4
Other (please specify)		11
<i>answered question</i>		88
<i>skipped question</i>		11

much harder year for people - flowers are a luxury item
Not in business in 2013
Sales vs. income?
From opening in March - June 15 - \$23,000
2013 was a wonderful year for us
\$50K
New business 2013; figures are only part year
closed 6 wks + a few days in 2014
see above
N/A
2013 wasn't a full year/didnt include a wedding season so the numbers aren't at all representative of an annual trend in sales

What time of day do you generally open for business?

Answer Options	Before 8am	8-10am	10-noon	Noon-2pm	2-4pm	5-6pm	After 6pm	Not open	Response Count
Monday	8	50	14	2	1	0	1	15	91
Tuesday	8	52	24	2	3	0	0	5	94
Wednesday	8	53	24	2	2	1	1	3	94
Thursday	8	52	26	2	2	1	1	2	94
Friday	8	54	24	2	2	1	1	2	94
Saturday	4	38	26	4	0	1	1	12	86
Sunday	2	5	14	4	0	0	1	46	72
Other (please specify)									15
<i>answered question</i>									95
<i>skipped question</i>									4

Sunday by appointment
Saturday and Sunday - we are in and out. Depends on the time of year.
And by appointment
We are by appointment only however we are at the studio at least 5 days a week. Saturdays we are definitely only by appointment only.
Currently only by appointment
By appointment
Because my business has not yet grown to full time, my hours depend on my workload and other personal business.
Open by appointment or coincidence
We are not a retail business so we are not "open" in that sense. Our employees are here usually between 8 and 6 on weekdays but all employees have flexible hours.
Could be open on Sundays for the seasons
we are not open to the public in a sales capacity
8:30-5:00. Weekends and nights available by appointment.
No store front, only in shop as necessary.
times vary depending what time classes are offered. We offer classes 7 days a week

Seasonal Saturday closures due to wedding and large event catering

What time of day do you generally close your business?

Answer Options	5-6pm	6-8pm	8-10pm	10-midnight	Midnight-2am	Not open this day	Response Count
Monday	46	19	5	3	4	13	90
Tuesday	49	25	5	4	6	4	93
Wednesday	51	22	6	4	7	3	93
Thursday	49	25	7	2	8	2	93
Friday	52	22	7	1	9	2	93
Saturday	33	12	7	1	9	12	74
Sunday	6	6	6	3	3	43	67
Other (please specify)							22
<i>answered question</i>							94
<i>skipped question</i>							5

Sunday by appointment
Close at noon on Saturday
Saturday and Sunday we are in and out; no set hours either day. During the spring-summer we are in the office more - could be here up to 8:00 pm
Sunday close at 4pm
Sat 2:00 pm
there was no option for 4pm on Sunday.
Saturday we close at noon
By appointment
Saturday 10-2
By appointment
M-Th 4:00-5:30 due to irregular hours of only being part time right now. This depends on the current workload.
Generally close on Saturday's depending on visitor count at 1 pm to 2 pm.
See above answer
Sunday - 4 pm
We close at noon on Saturday
4 pm on Sundays
Close earlier on certain Saturdays
we are not open to the public in a sales capacity
saturday we close at four pm sunday we close at 4pm
Weekends and nights available by appointment.
We often have customers later, and would open earlier if our employees were available.
This means 10-6

Where are the majority of your customers located? (Check all that apply)

Answer Options	Response Percent	Response Count
Within Laramie	65.3%	64
Within Albany County	49.0%	48
Statewide	31.6%	31

Out of state	31.6%	31
Campus population	25.5%	25
Internet sales	12.2%	12
Don't know	2.0%	2
answered question		98
skipped question		1

Where are the majority of your competitors located? (Check all that apply)

Answer Options	Response Percent	Response Count
Within Laramie	60.2%	59
Ft. Collins or Cheyenne	28.6%	28
Internet sales	20.4%	20
Out of state	19.4%	19
Within Albany County	10.2%	10
Statewide	7.1%	7
Don't know	3.1%	3
answered question		98
skipped question		1

Where are your suppliers (the wholesalers and others who sell products to you for resale) located? (Check all that apply)

Answer Options	Response Percent	Response Count
Out of state	75.0%	63
Within Laramie	31.0%	26
Statewide	22.6%	19
Within Albany County	13.1%	11
Internet sales	13.1%	11
Ft. Collins or Cheyenne	9.5%	8
Other (please specify)		19
answered question		84
skipped question		15

none
Denver
Do not resell products.
Cheyenne, Wy
Sears corporate suppliers
denver
na
rely on donations of used goods
WY
We don't have any suppliers.
Out of state auctions
worldwide; I import from Europe
cooperate warehouses
we do not resale

colorado
n/a
Mostly in Denver
N/A
Many of our suppliers are European, or are small speciality companies or other family-owned businesses/artsts.

What are the major issues or challenges facing your business today?

Answer Options	Response Count
	74
<i>answered question</i>	74
<i>skipped question</i>	25

getting the word out
economy
ads in the yellow pages for flower order gathers/ not real brick and mortar shops
none
Keeping qualified help in Laramie
grant money
slightly out of the way location, business model unusual for Wyoming
Parking
Internet services which allow people to do For Sale By Owners and market like a real estate company.
For Sale By Owners; discount brokerages; the economy; overbuilding of apartments
Name Recognition, growth.
brick and mortar retail vs internet sales
The younger generation is not interested in joining the organization, and current management
Getting more people in the door. Need more retail businesses like ours to increase traffic
N???
Internet vs brick and mortar
Our industry is facing significant reimbursement reduction through healthcare reform.
internet sales, show rooming. A lack of community support.
Retaining Staff
competing with non professionals who appear to be professional until they ruin a session and deliver a poor quality product.
The change to Internet sales.
The University of Wyoming pulling business east of town in the fall, & the University Store (government) competing at a wholesale end.
Lack of downtown parking
Taxes- So expensive to add more employees.
Funding
Not enough space.
Rise in businesses (both for-profit and non-profit) accepting used goods
Parking
Visibility, cost of advertising, my shy personality
Government
Costs associated with transportation, increased costs of lodging, food
Alcohol laws.

Lack of customers. Retail on Grand is dead. Mostly real estate, hair places, take up parking.
High taxes
parking
Ebooks and young people not reading.
Government moves too slow. Usually takes 12-24 months to close new business.
Any business must continue to evolve and offer relevant services to meet the needs of customer. The major challenges in Laramie are the publicly-funded entities that do not reliably support local providers. There exists a mindset that quality work and competitive pricing must be procured outside Laramie or Wyoming and this hurts Laramie and Wyoming's abilities to develop the commercial and professional infrastructure to meet the needs of the population. It also hampers growth because has gone and on over decades and decades. Laramie's transient population of UW employees and students represents a challenge in terms of changing this mind-set but it goes well beyond these two groups. The incentive to procure goods and services locally needs to be much stronger than currently devised - particularly as it relates to tax-supported enterprises. As an example, the City of Laramie plans upgrades to the Recreation Center yet procures architectural services from a Denver firm. The facility was originally built by an out-of-state firm yet there are certainly Wyoming contractors and architects that could provide these services if the City had greater incentive to use them. On a side note, the City Council is at present engaged in a study to determine why sales tax revenue suffers when people shop outside Laramie. Although public enterprises don't pay sales tax, they are larger net consumers of goods and services and as such have an even greater responsibility to keep their purchases local. Dollars kept in our community, whether they're spent by public or private enterprises continue to revolve locally to better develop local commercial and professional infrastructure. The city is only one local example. There is also Ivinson Hospital, Albany County, the school district and, obviously, the University of Wyoming. Laramie is a "company town" for UW but all tax-supported entities in Laramie have a major obligation to support the local economy and should be expected to justify ALL examples where they move dollars outside their tax base. The sort of Economic development that relies on bribing out of state enterprises to locate here will continue to fail because the most effective form of economic development is organic. While not as "sexy" as getting an out of state operations to relocate here, a concerted effort to keep local dollars local and to build our economic base from within will result in a more stable and stronger local economy because the various needs for goods and services can be built over time. Laramie is littered with unfinished business parks and the locations of various businesses that have relocated here only to either shut down or move on. It is past time for the entire community to work toward supporting one another. The publicly financed operations in our community must be made more conscious of their obligation to the greater good of the community in which they operate. That is the biggest challenge to every business owner in Laramie.
Parking - owners and their employees taking up all the parking for customers
declining interest, competitors are acquiring good merchandise (flea markets)
Ignorant "locals"
The economy
Good parking for my customers - we have 2 hour parking that if filled with all-day parkers. Need more enforcement of 2-hr parking in downtown.
being a new business less than 3 years
parking for employees
supply of inventory, lender regulations
None
Weather
A bit of a struggle keeping inventory current.
We are very satisfied with the growth of our business at this time.
Alley water damage
N/A
We are out of space at our current location but do not wish to leave downtown
keeping equipment operational
Customer retention

Retention and competition.
lack of advertising/motivation,the owner of the building
Scheduling our employees and business hours, finances and accounting (I could use some training), impending FDA regulations, high cost of advertising.
Ensuring continued growth in a flat economy.
I really do not feel we have any issues, but would always love more foot traffic. Such as old town Fort Collins
I really do not feel we have any issues, but would always love more foot traffic. Such as old town Fort Collins
Nearby businesses are closed due to the fire and some buildings are vacant. It would be great to have more foot traffic in front of our business.
Growing our baseline clientele in such a transient town.
getting into the Internet business
Advertising
Business is good. No major challenges
Finding quality labor
Changing market and lending requirments
Economic attitude of today
Price comparisons to large box stores/grocery bakeries -- customers expect low prices due to commercially produced products, which aren't cost effective for our services
Employee retention and creating adequate production space.
The risk of inventory damage from a nearby coffee roasting business is a very real and pressing concern. Because of an uncertain future due to the coffee roasting, we are trying to boost online sales form our website. Any help promoting that would be great.
internet sales, not enough teachers for classes.
Lack of local supplies and education

What are the major assets and benefits that help your business?	
Answer Options	Response Count
	77
<i>answered question</i>	77
<i>skipped question</i>	22

location and products we offer
personal services
downtown foot traffic
employees like Living in Laramie and working downtown
small town - good reputation
downtown Laramie and university community, online forums and review sites
great employees
If the economy is good (even if the perception is good) then people buy real estate
Added Value of Services & superior customer service.
specialty products and knowledge, long term experience and reputation
Quiet, safe location to come sit down and have a drink
The network of Antique dealers around the country, and the fact that we are the only true tobacco shop in town.
Proximity to the coffee shop and Poppy's
???

local ownership
Laramie's population is ideal, and for that matter the State of Wyoming, for our business. We have a larger aged population than the nation average.
Trey. Location.
location
Our 106 year old reputation of high quality products and great customer service.
A unique locally hand crafted product.
Custom
Great place to have an office
Our trade-floral design. Our retail is unique to everything else offered in Laramie.
Brand Recog.
Treating people right.
Customer loyalty, consistency in service, people that believe in and support our mission.
Hard work
Easy transportation (nearby parking, free bus, bicycle racks)
God's grace
There is only one Laramie!
Social
Use of personal funds to keep doors open
Home owned and repairs done on location
Continuing upgrade/beautification/accessibility of downtown
Employees
A product that everyone, well almost everyone, loves.
The quality of employees we find here in Laramie and the high speed Internet we have here.
Low indebtedness, loyal employees
Not much competition
established reputation both for buying and selling
My products are top. Tourists know. Location is premium
We have the best prices on cell phones and the best service overall
Dedicated professional and well trained staff
Lots of tourists love our downtown, especially enjoy the western lifestyle.
I am the
UW of Wyoming students/professors
N/A
Word of mouth advertising because of our stellar customer service.
i feel that our downtown is unique, and draws people from colorado, nebraska, on a regular basis, and many outlying towns because it is appealing. many towns do not have the selection that we now have.
Location.
Most of our sales, and contracts for services are currently online. As we establish a presence in Laramie we hope to grow our business within Wyoming.
Word of mouth
N/A
we have a solid customer base and a parking lot
Proximity to courts
retail liquor license
Long lasting brand and name
Customer service and credibility.
everybody likes to talk and the people involved are known in the community

Variety of our skills, Jim's construction skills and willingness to build us a lab, the Wyotech students' loyalty, and the warm welcome of Laramie
Our location, products, staff and enthusiasm for locally produced products.
A healthy down town with great atmosphere and culture.
A healthy down town with great atmosphere and culture.
Word of mouth recommendations within the community fulfills new business acquisition.
Skee-ball! The support from certain individuals and nearby businesses has been very helpful and is much appreciated.
loyal customers! When people in Laramie like what you do they support you relentlessly.
Product quality. All furniture manufactured in Laramie. personal customer service
Excellent service, niche market
Laramie has a stable housing market compared to the majority of the country. This makes an enjoyable market to do real estate in.
Downtown Location and customers desire to shop locally with a company that is trying to compete with out of town competition prices
Connections with in the community
downtown
Word of mouth, business partnerships, social media
Knowledge of staff and owners regarding products
Our unique, high quality products and personal service are two huge assets of our business. The products we carry are difficult to find elsewhere. Highly educated and well traveled customers recognize this and do not hesitate to purchase our products. We also establish excellent relations with our customers -- many return once a year on their vacations.
staff and reputation
Transient population

How would you rate Downtown Laramie for the following?						
Answer Options	Excellent	Good	Fair	Poor	No Opinion/ Don't Know	Response Count
Public arts/murals	47	29	14	4	3	97
Walkability of the area	41	39	14	1	1	96
Safety	38	48	8	2	0	96
Historic character	32	48	13	2	2	97
Special Events	22	44	22	5	3	96
Cleanliness	19	35	28	14	1	97
Marketing/Promotion (of itself)	17	48	19	9	1	94
Shopping hours	11	42	30	11	2	96
Business mix	9	41	33	11	2	96
Parking	5	26	44	23	0	98
<i>answered question</i>						98
<i>skipped question</i>						1

Please indicate which type of promotion or advertising you use and rate its effectiveness in marketing your business.

Answer Options	Excellent	Good	Fair	Poor	Do not use	Response Count
Word of mouth	70	19	5	0	1	95
Internet/website	20	39	18	0	11	88
Social media (Facebook, Twitter, Instagram, Pinterest, Linked In, etc.)	15	32	26	0	15	88
Direct Mail	7	7	12	3	54	83
Electronic newsletters (e.g., Constant Contact)	5	14	11	5	48	83
Local Newspaper	4	18	25	16	28	91
Billboards, Signs & Flyers	4	16	13	5	46	84
Radio	4	10	19	10	44	87
Regional Newspaper	0	5	5	7	65	82
Other (please specify)						6
<i>answered question</i>						96
<i>skipped question</i>						3

Are you aware of the Laramie Main Street Alliance (LMSA)?		
Answer Options	Response Percent	Response Count
No	5.1%	5
Yes	94.9%	94
<i>answered question</i>		99
<i>skipped question</i>		0

If yes, have you used any LMSA programs or services? (Check all that apply)		
Answer Options	Response Percent	Response Count
Monthly E-Newsletter	36.7%	33
None	33.3%	30
Special events; activities	30.0%	27
Cross promotion on Main Street social media feeds	27.8%	25
Assistance with design and property improvements (Façade Grant)	16.7%	15
For Rent or Sale property listing	14.4%	13
Website linkage	13.3%	12
Help navigating City permits	6.7%	6
Business Coaching	5.6%	5
Technical Assistance & training workshops	5.6%	5
Not Applicable	5.6%	5
<i>answered question</i>		90
<i>skipped question</i>		9

How can the Laramie Main Street Alliance better serve you?

Answer Options	Response Count
	51
<i>answered question</i>	51
<i>skipped question</i>	48
continued support	
Can you help with coaching on social media? Something people 50+ could understand?	
Help with maintaining/restoring historical building	
advertising, and include East of 3rd St businesses in downtown events instead of isolating such events down by the train tracks. Invest in more parking.	
LMSA is doing a wonderful job; I need to contribute more - the organization is only as good as the members	
local and on UW advertising	
I have tried to get involved in the past, but have a hard time getting any information. It would also be nice to feel like a part of the downtown, but if you're not a bar or a restaurant, it seems like you don't exist.	
Being on the east side of 3rd makes it so we don't get treated like we are downtown. I don't know what is going on ever because I purposely do not own a computer, so I would like to be able to stay in the loop. We need to recruit more businesses to the downtown such as a men's clothing store, and another shoe store to add competition.	
Clone Trey Sherwood - she does a fabulous job!	
??	
I find myself very restricted because of Sears policies. They do not let me do my own promotions, which makes it difficult to participate with local things	
We need to have a focused effort in bringing the cleanliness back up to par. Everything in general down here has a dingy feel to it.	
All of the above. Knowledge of what is available.	
Keep up good work	
Continue to offer great events and to make the population constantly aware of the downtown and what it has to offer.	
All my expectations and hopes for help from Main Street have been surpassed. Trey Sherwood is an amazing asset to our downtown.	
By not passing the buck when a serious uncomfortable question comes up. IE: Parking, poor alleyways which water run off is of a problem.	
By persuading retail businesses that it is in their interest to park their own vehicles away from downtown and that they need to be open when people want to shop as opposed to Weekdays 'til 5 PM and Saturdays.	
they seem to be doing a great job!	
Get people off of third and on to second street when they drive into town.	
Monthly e-feature on non-profits in downtown area. E-news is great, but too long to read, only scan the top 3-4 articles. Everything else is lost.	
I can't think of anything they ever done for me.	
Is it the same as Downtown Laramie Business Association with Trey Sherwood? If not, who does what?	
LMSA is a very good partner with us now.	
Get rid of Farmers market downtown	
Foster a spirit of cooperation among downtown business owners. Our primary competition is East Grand, Cheyenne and Ft. Collins - not each other	
You guys are doing a great job!!	

WE NEED PUBLIC BATHROOMS LIKE OTHER TOWNS.
Wish the city would spend their money for this instead of a survey on outshopping. Outshopping is a fact of life and happens in every town. We get people from Ft. Collins and Denver who want to come to the charm of a small town with a vibrant downtown with character.
Due to the type of business we are, most of these services don't really apply to us.
We would like your help updating and marketing for office space some property we own on South 3rd
More law enforcement on Thursday, Friday, Saturday nights would be god - too much vandalism - trash - vomit, etc.
Just keep up good work and visibility - to draw more Laramieites to shop in town
Recruit diversity. Reduce bars, tattoo parlors. Get "real" high-end retail; show stores, ladies clothing, lingerie
More personal contact than once every so often, follow up in a timely fashion, less favoritism.
Keep up the good work!
laramie mainstreet has done so much i am thankful for the great leadership of trey sherwood
Dont know. Maybe more retail would be nice.
We are very satisfied with the attention we have received so far. Because we have been a location neutral business we are thrilled with our space and location in downtown Laramie.
Keep doing what they are doing
Keep talking
Just keep up the good work and stay viable.
Keeping more connected to all businesses who may be in an industry which doesn't allow much leaving the business during hours. Would love more face to face communications!
Keeping more connected to all businesses who may be in an industry which doesn't allow much leaving the business during hours. Would love more face to face communications!
Keep up the good work! I could not ask for much more.
I've been lucky to have The Main street alliance always ready to help my business. This is due entirely to the energy and dedication of the director Trey Sherwood
I need to get to know some of the programs listed above better and how to incorporate them into our marketing.
I think LMSA does a great job, it is remembering that it is a resource to use and help.
Instead of giving us flier to post, give actual help to bring people into our stores ready to buy something.
Possibly provide more information on what LMSA can do for me as a business specifically - such as a flyer with an overview of services such as the programs for property improvement and assistance.
We need our products marketed to out-of-state tourists. Most Laramie locals have either purchased one of our products and are not in the market for more, or they are not interested in spending the money for the quality products we provide.
Keep promoting our awesome city

Appendix "B"



Downtown Consumer Survey



Thank you for taking a few moments to help make Downtown Laramie even better! This information will help us strengthen downtown's economic and social vitality - Please respond! You may complete the survey on-line if you wish: <http://tinyurl.com/mqduk3o> or by scanning the QR code at the top of this page. Individual survey responses will be kept **STRICTLY CONFIDENTIAL**, and will be compiled and summarized in statistical format by Community Builders, Inc., the consulting firm retained to conduct the survey. Please return your completed survey by October 1, 2014 to Laramie Main Street Alliance (207 Grand Avenue), or mail to Community Builders, Inc., 873 Esterbrook Road, Douglas, Wyoming 82633.

1. Where do you live and work? (Choose all that apply)

	Downtown Laramie	UW Campus	Somewhere else in Laramie area	Outside of Laramie area
Live				
Work				

2. On average, how many times per month do you come to Downtown Laramie?

- 1
- 2 - 5
- 6 - 10
- 11 or more
- Never

3. How would you rate Downtown Laramie for the following?

	Excellent	Good	Fair	Poor	No Opinion, Don't Know
Customer service					
Safety					
Parking					
Walkability of the area					
Shopping Hours					
Cost of merchandise/services					
Selection of merchandise/services					
Public Art/Murals					
Cleanliness					
Special Events					
Business Mix					
Historic Character					
Marketing/Promotion of downtown					

4. Where do you **most often** purchase the following? (Choose only one location)

	Downtown Laramie	Elsewhere in Laramie area	Out of town	Internet
Antiques & 2nd Hand items				
Clothing				
Shoes				
Books				
Furniture & home furnishings				
Gifts				
Jewelry				
Package liquor				
Groceries				
Flowers				
Household Supplies				
Electronics				
Sporting Goods				

5. Where do you **most often** go for the following purposes? (Choose only one location)

	Downtown Laramie	Elsewhere in Laramie area	Out of town
Beauty, hair care			
Drinks or cocktails			
Eating out - fast food			
Eating out - sit-down			
Movies			
Legal services			
Entertainment			
Banking			
Other financial services			
Insurance			
Medical care			
Eye/optical services			

6. What would make you shop Downtown Laramie more often?

7. What is your gender? Male Female

8. What is your age? 18 and under 30 - 39 50 - 59 70 - 79
 19 - 29 40 - 49 60 - 69 80 and above

9. Please provide an email address to be entered into a drawing for a \$50 Downtown Laramie Gift Certificate and to be added to the Laramie Main Street Alliance mailing list (you may opt out at any time):

THANK YOU!

Detailed Responses to Each Question of the Consumer Survey, Including Detailed Responses to Open-Ended Questions

Where do you live?	
TOTAL	411
Downtown Laramie	32
UW Campus	16
Somewhere else in Laramie area	322
Outside of Laramie area	41

Where do you work?	
TOTAL	389
Downtown Laramie	68
UW Campus	160
Somewhere else in Laramie area	127
Outside of Laramie area	34

On average, how many times per month do you come to Downtown Laramie?	
TOTAL	412
1	32
2 - 5	115
6 - 10	106
11 or more	155
Never	4

Rate Laramie Downtown	Excellent	Good	Fair	Poor	No Opinion, Don't Know	No Answer
customer service	24.1%	50.6%	14.9%	4.8%	1.7%	3.9%
safety	35.2%	47.0%	11.1%	1.7%	1.9%	3.1%
parking	11.1%	24.8%	41.2%	18.8%	1.4%	2.7%
walkability of the area	43.9%	41.9%	9.6%	1.0%	0.0%	3.6%
shopping hours	7.7%	34.2%	32.3%	20.5%	1.4%	3.9%
cost of merchandise/services	7.7%	33.5%	40.2%	13.3%	1.2%	4.1%
selection of merchandise/services	6.0%	30.1%	38.6%	21.0%	0.2%	4.1%
public arts/murals	54.9%	27.2%	7.5%	2.7%	2.4%	5.3%
cleanliness	20.5%	45.3%	16.4%	0.7%	0.0%	17.1%
special events	19.8%	39.8%	15.4%	3.9%	3.6%	17.6%
business mix	9.2%	32.3%	26.5%	12.5%	1.7%	17.8%
historic character	31.6%	35.2%	12.3%	1.9%	0.7%	18.3%
marketing/promotion of downtown	20.2%	33.7%	18.6%	6.0%	1.7%	19.8%

Where do you purchase each of the following most often?	Downtown Laramie	Elsewhere in Laramie Area	Out of Town	Internet	No Answer
antiques & 2nd hand items	44.6%	18.8%	17.8%	3.9%	14.9%
purchase clothing	14.0%	10.4%	48.4%	22.7%	4.6%
shoes	20.0%	7.7%	45.3%	20.7%	6.3%
books	25.8%	15.9%	12.3%	37.8%	8.2%
furniture & home furnishing	15.9%	15.4%	50.6%	6.5%	11.6%
gifts	50.8%	12.0%	14.2%	13.5%	9.4%
jewelry	27.5%	8.4%	30.4%	15.7%	18.1%
package liquor	5.3%	72.3%	5.3%	0.5%	16.6%
groceries	13.7%	72.0%	6.0%	0.2%	8.0%
flowers	34.7%	37.3%	6.0%	5.5%	16.4%
household supplies	4.8%	72.3%	10.6%	2.2%	10.1%
electronics	6.3%	26.7%	26.3%	28.2%	12.5%
sporting goods	13.5%	20.0%	34.6%	14.5%	15.7%

Where do you most often go for each of the following?	Downtown Laramie	Elsewhere in Laramie Area	Out of Town	No Answer
beauty & hair care	28.7%	46.0%	16.6%	8.7%
drinks or cocktails	72.3%	12.3%	3.4%	12.0%
eating out (fast food)	13.0%	73.3%	3.1%	10.6%
eating out (sit-down)	79.0%	11.8%	4.3%	4.8%
movies	4.8%	70.1%	11.6%	13.5%
legal services	18.3%	37.1%	18.3%	26.3%
entertainment	38.1%	31.8%	16.9%	13.3%
banking	28.2%	54.2%	10.6%	7.0%
other financial services	11.1%	48.0%	20.2%	20.7%
insurance	8.9%	48.9%	28.9%	13.3%
medical care	2.2%	65.1%	20.5%	12.3%
eye/optical services	13.5%	56.6%	14.9%	14.9%

What is your gender?	
TOTAL	399
Male	104
Female	295

What is your age?	
TOTAL	398
18 and under	5
19 - 29	144
30 - 39	91
40 - 49	59
50 - 59	52
60 - 69	41
70 - 79	6

What would make you shop Downtown Laramie more often?
having more money and public restrooms
get public restrooms
Actually having stores that appeal to my needs and interests
Western outlets
Having more money. Lower cost clothing shops beyond 2nd hand shops
Lower prices; and public restrooms
more antiques
more variety.
Later hours
More options of merchandise in stores
More clothing stores
if I had more money to spend and if the hours of the store were a bit better .
A good; large bookstore
more variety with the shops
Parking sucks; better incentive to shop @ Safeway
mall
More clothing and sports stores
better prices
If they had a good video game store down town
better variety of shops
more clothing stores like American Eagle
more clothing stores
More time in my day and more student deals.
more clothing stores
better prices
More women's and children's retail - reasonably priced clothing is hard to find in town.
better variety; much much better prices
a chase bank.
Not sure
I would enjoy downtown Laramie if there were more art murals and more/nicer breakfast restaurants!!
larger section of books and entertainment
Public restrooms!
more clothing; accessible restrooms; benches to sit along the street
Different stores
Just more clothing stores for women and men
Clothing
more selection Better prices
Longer hours once a week; more events and advertised sidewalk sales
Best buy or more technology stores
Better parking and store hours.
Clothing stores; seafood and chicken restaurant
More clothing stores.
I shop a lot already love downtown and love supporting locally
great store's
More shops
Cables
N/a

More clothes stores
open on Sundays or better hours
more options for young people's clothing stores
gifts
men's apparel
pedestrianization
more variety; more competitive selection and price a
Better parking
More variety; better hours; better prices
More clothesline the
More retail
Unknown
game shop
Better hours
Na
Better shop selection geared more towards young men.
Greater Selection especially men's clothing
Family events
More bookstores
Better shops. Better hours. Cheaper!
nothing
Nothing.
To live in Laramie
More events
More variety of shops.
Clothing
More variety such as clothing
better clothing
no answer at this time
if I had more money
Great restaurants
Better parking
No thanks
better parking
more clothing
Better parking.
All above
more stores
if I lived here
don't know
Increase. In salary
Nothing really
more clothing
More street venues
More events
Clothes
running shoes
More selection and better customer service at restaurants
Better stores

Easier access
more variety of stores!
Visiting the area more.
later store hours at some places; lower prices; longer Saturday hours at some places
Better prices; more shops; less bars; parking garage! more family things to do- Too much focus on adult entertainment and UW affiliation. I don't think my children or my parents have too much to do or see or be or feel a part of in the downtown. My husband and I are mostly content with it but usually visit only at nighttime and go out of town on the weekends.
If I lived in or near Laramie. I love Laramie.
More services.
Better Hours; More Friendly Staff/Owners
I shop downtown a lot. On certain kinds of things I would be tempted by more variety (clothing) and cheaper prices (shoes) as well as simple availability (movies). I appreciate that this form is about shopping and business but I value the downtown as a focus of community activity -- special events; concerts; public markets; and public spaces are very important in my thinking about downtown.
If there were better stores and more options; I'd probably go there more often. For sporting goods; I think Cross-Country connection has a limited selection and is overpriced. Not much clothing options for males -- Atmosphere is OK for some stuff but it is pricey and doesn't really offer any non-mountainy stuff.
I like the current state of the downtown area and frequent it almost daily
Stronger showing of utility goods. Stationary; pharmacy; household etc. As well as personal and entertainment like men's clothing; cinema; and package liquor.
A plaza.
More clothing stores. There is only 1 store for women to get clothes downtown.
I already shop there quite a hit
More trendy retail options; more restaurants
Women's clothing options are lacking. I'd love to see a store like Poppy's (very small selection of) clothes and accessories taken to the next level. An Ann Taylor Loft would be amazing! or a selection of clothes like Modern Vintage Boutique or Hazel and Olive. A store like Maximum out of Promenade in Loveland would be fantastic...quality brands like Pandora; Vera Bradley. Another area would be professional and talented hair stylist. I've tried several salons in town for myself and family and have been disappointed. The Copper Kettle is an opportunity waiting to happen...if they could learn marketing; displaying; products to carry and service from The Cupboard in Ft Collins; I would shop there often. However; their shelves are bare to nothing. Overall; downtown needs the expectation and support to be as good as Ft Collins to keep the shopping local. You cannot expect the community to shop there purely "to support local"....the local shops have to take strides to make shopping worth staying local.
A clothing store that caters to women's style that is not business casual (Maurices); western; selected for classy older ladies; expensive outdoor recreation or second hand.
More parking and inviting store fronts
Cleaning up the empty lot near the Cowboy. More events that involve closing off the streets; because thats awesome.
Comic books
Stores that I recognize; prices that were competitive with the Internet; things I actually want to buy; the ability to park downtown without having to walk 3 blocks; the removal of parking tickets downtown; nicer people; better wages for the employees downtown.
Later store hours; a greater diversity of retail options if possible; competitive prices. More parking lots that were closer to the 2nd and Ivinson/Grand/Garfield area.
record store and men's clothing (casual and business)
I try and shop in downtown Laramie as much as possible--but sometimes I need a Target; or a Barnes and Noble; or a TJ Maxx; or just to get out of town. Could you do something about the occasional claustrophobia of winter weather?
Stores that better fit my needs/interests.

<p>Parking is always an issue. I find that in general most of my purchases take place outside of Laramie due to cost. I usually can find the same things for far less in other places. I would really like to see more for children downtown. I love how in historic downtowns that I have visited abroad they have fun fountains for kids to run in or interesting sculptures/play areas for them to play around on. It makes enjoying an ice cream far more fun. I love the art/murals downtown but wish there was more created for; made by or geared for children. Is there a way to make the depot park interesting or child oriented? In my opinion too much focus on our historic downtown is on bars and adult entertainment. I just wish I could see a child's touch here or there. I know my kids would like it also. When I go downtown I rarely do with my children and I'm with my children during daytime business hours. So that means I'm not spending money downtown during the day. The only time I really think to go downtown is for drinks with adult friends or of course to the farmers market which we LOVE.</p>
<p>if 3rd street did not look like a ghetto from the ramp towards downtown</p>
<p>More variety; lower prices. There are few choices for children's clothing and men's clothing. And no market between cheap and super expensive for shoes for women. the variety is also lacking.</p>
<p>I think you guys do a great job promoting downtown Laramie. If you ever want to collaborate with events at the Cowboy Saloon please feel free to email me at tyler.john.hopkins@gmail.com.</p>
<p>more variety of selection. more clothing shops. you don't have to offer cheap prices but maybe coupons or discounts to draw people in. Kohls offers Kohls cash. For however much you spend you get Kohls cash; makes you go back and use it. Bed Bath and Beyond offer 20% of most expensive items. Kirklands offer percentage off one item; etc; etc; etc.</p>
<p>Children's clothing store that was not SO expensive; as well as options for men's clothing</p>
<p>more choices that aren't antiques; western wear; or clothes that only older ladies or wanna-be trendy 20 year olds wear (Maurices is only good for this). a store that sold a few new items with clean and well-picked consignment (NU2U is sort of gross and Mimi's caters to a certain style set) along with neat gifts would be great.</p>
<p>Hobby/crafts shop; and I'd say better parking; but... there's really no room.</p>
<p>Better hours - everything is often closed when I'm off of work. A little more variety couldn't hurt although there is a lot downtown.</p>
<p>Friendliness; selection; price; parking.</p>
<p>I don't mind a slight increase in prices; it's what keeps businesses alive. But I refuse to pay a 100% markup to shop local. I would also love to avoid the bar vomit on sidewalks around town on a Saturday morning. The Cowboy; 3rd Street; Roxie's; and the Buckhorn should be required to pressure wash sidewalks in front of businesses in which their over-served patrons walk to and vomit in front of. No one wants to shop around that on a Saturday morning.</p>
<p>More choices</p>
<p>Easier access for biking into and around downtown.</p>
<p>Better hours</p>
<p>Competitive prices and extended hours</p>
<p>Parking more convenient!</p>
<p>Better store hours; if places sold professional clothing; prices were not so high.</p>
<p>More retail stores that carry clothing for adults; not just UW apparel and "college age" gear (Maurice's).</p>
<p>Fitness center</p>
<p>A circular insert in the paper about downtown Laramie sales and specials; and comparison to other options showing that downtown is better/cheaper</p>
<p>More business variety.</p>
<p>I would like there to be off curb bicycle parking. I would like two more restaurants....one specializing in breakfast.</p>
<p>Nothing. I shop downtown first. I shop elsewhere when I can't get what I need downtown.</p>
<p>office supply store downtown!</p>
<p>I usually don't shop too much Downtown. I think more variety in the shops/merchandise would be better. If I'm downtown; it's almost always for drinks/dinner/events.</p>

More reasonable prices (e.g.; The Knothole's markup of Meesh & Mia merchandise -- I can buy direct from http://meeshandmia.com/ for cheaper with free shipping or a promotion that negates shipping) and better hours (many stores close just as I'm about to go shopping) would be a start.
It's possible some additional store that I happened to like would move in; but really; I think downtown is great and about as good as it could get.
I shop here most of the time regardless; but having a women's and men's clothing store that sold business clothing would be nice.
More clothing options; which seems extremely difficult. DL is a great place; love the work you do.
Clothing stores for adult adults
Better hours; better prices; more variety.
More selection of products; better sales.
More stores open on Sundays.
If stores were open longer hours in the evening. It's often tough to get downtown and shop after work when businesses only stay open until 5:30 or 6:00 pm. Customer service could be greatly improved in all types of business. Some stores make you feel like your are imposing upon them when you go into their store and ask them questions about their merchandise. Some stores have great customer service though; but others I won't even step into because of lack of customer service and lack of quality of merchandise. And quite frankly; better prices for most everything can be found in other towns or on the internet.
Already try to shop in downtown as much as possible. More businesses open into the evenings and on Sunday/Monday would help.
Hours of operation available for working people - such as weekends or evenings. More reasonable pricing and options.
If there were more clothing store for Mens and Womens
Shop workers actually happy to have my business.
Me venting hours and more clothing
Since I only have weekends off; it would be nice to be able to shop on sundays.
If I worked in down town
More clothing stores
Better Service; Later hours
later hours; more trees and more street activity like christmas lights and banners across the road. Also the speed limit needs to be 20 like downtown Cheyenne. 3rd Street can get so noisy with the trucks.
Office supply store! A quick stop for paper; envelopes etc
More clothing boutiques; coupons to downtown restaurants and businesses.
More affordable options for shopping and a larger variety of stores.
Longer business hours in the evening; more diverse clothing stores; a store to get everyday items (like an old-timey pharmacy).
I like the downtown mix overall--and think its valuable that not everything I want is immediately in arms reach (downtown or elsewhere in town). Some of my preferences are really business specific--if dodds would carry my size; I'd be more willing to buy shoes downtown. I like the presence of non retail/food storefronts downtown (tiger tree; WEST; etc.) because it does help show broader ecomonic activity than some people think of initially about town (maybe). Even if I'm not snooping at these places; they're part of what I appreciate about the downtown area. Would love to see the coop expand downtown. It's not my first stop for groceries; but it's one of the most consistent places where I spend money downtown. Love the restaurant options downtown; and the absence of chain restaurants. Is laramie big enough to have a "food week"?
More selections
More events like the Painting on the Patio evening at Alibi!
More variety. More clothing stores for college age people. Restaurants with higher quality and that are more unique not just bar food.

More options More shops
More variety and more shops
If Grand between 1st and 3rd Streets was turned into a pedestrian area (see Ft. Collins; Boulder...) and if there was a greater variety of useful stores (especially much more variety in clothing and shoes). The antique stores are nice and original but not very useful -- more for tourists than for residents.
Extended hours on the weekend for different shops.
Another good clothing store; and another sit down breakfast restaurant.
More clothing options. No where to get clothes in Laramie.
More modern clothing stores
Parking (small shuttle bus?) Prices
More variety of shopping.
I did just move here so some of my out-of-town answers are more about having just moved from Colorado. Having more variety in downtown locally owned retailers and more in general - and also having more stores open later and/or on Sundays would help. Later in the evenings esp on the weekends I get uncomfortable with the density of drunk ?students?; so some curbs on how tanked people get would help me enjoy staying out later.
Store hours are somewhat inconvenient. Used to love to go to the Wyo; but it is not open; so that is also unreliable
Better parking access; better selection of goods
More selection at the coop; Salvation Army remodel; better hours more selection at actionball.
If I had more money to spend.
Longer hours and events that include all of downtown. Not just the places on 2nd and Grand. Some hidden gems are on the outliers of these streets and they don't get near as much promotion.
Living closer; I think the downtown is a great place with great energy.
More selection in each store.
More businesses open later; more clothing
It's not very walker friendly. The alley ways are not friendly. Your shop keepers don't like families. No where to sit outside except one park. Not enough benches. No snack shop.
More practical and affordable options.
If I had more money!
Clothing
If you would give other business a break to open here that might help. Not many want to shop here because prices are much cheaper out of town. Down town is quant but a dead drag. If you want Liquor you can find that everywhere. Too much so. Seems like you are promoting a drunk town hangout only. Why couldn't you think about a Lowe's; Home Depot; or Mennards? A shopping mall would be nice; or a Costco or Sam's. We are on the busiest interstate in the US. Everyone tells me stuff cost more to bring to Laramie. Somehow that does not add.
A greater variety of kitchen and household supplies; groceries; and especially women's clothing would get me shopping downtown more often.
More variety of clothing and apparel. Not everyone is size 0.
More clothing options and bring the bakery back!!!
stores open evenings (after 6pm) and Sundays
More vegetarian and vegan friendly restaurants.
If it looked more inviting. Like Grand Ave. and the University. If the down town area and 3rd street can be more warm and comfortable I will go there more often. Down Town and 3rd street from the interstate all the way to Reynolds look extremely trashy.
A larger selection of products and competitive pricing on items that are available much cheaper online or out of town.
Mainly a wider variety of stores and better hours (e.g.; open on Sunday's).
If it had the stores selling what I want at an affordable price.
Bus from campus

Better selection and price of useable goods instead of stuff I don't want to purchase.
Selection.
a hardware store; a regular clothing store (i.e. not specialty; not used; not for the college crowd); shops other than gift and art shops
If there were more businesses and if businesses offered more competitive pricing.
Affordable clothing; nice restaurants
I hardly shop for anything in downtown Laramie because the selection is awful; the prices are high; and even in the rare event that I do decide to shop in downtown Laramie; I usually cannot find a store that is open past 5 PM during the week (and guess what; I have a job where I work; tada; 9-5!) and they're usually closed or have very limited weekend hours. It's kind of absurd that a man can't find a pair of pants in Laramie unless he wants to go to Walmart; Kmart; or wants to wear Carharts or Wranglers...c'mon; it's pathetic! Change all of that and I would shop in downtown Laramie. I honestly don't ever see it changing...until then I'll enjoy a few restaurants downtown; but that's it.
I'm not sure that anything would change. There is a limited choice of clothes and shoes for children/tweens - although my family is slowly moving out of this. I don't tend the shop for much beyond necessities.
Water balloon fights; a noodle factory; and free hot tea.
It would be nice if more businesses were open on Sunday.
Better variety. We have lost a lot of clothing stores over the years. Choice for children's clothing very limited and none for men. Different hours - when working full-time; it is difficult to get downtown - has to be on the lunch hour and then parking can be an issue. Sunday is a good day for doing downtown; but hardly anything is open.
More variety; better customer service; competitive pricing and evening store hours would help. An anchor type store like Natural Grocers that was within walking distance of downtown would likely draw in people who otherwise take their business to Cheyenne or Fort Collins.
Later evening hours; as well as more Sunday hours. More selection of items; as well as better priced items. Need a CVS or full service Walgreens; clothing stores like Ross; Marshall's; or TJ Max; and full service big office supply store like Office Depot or Office Max. Need reasonable dining options like Chipotle; Garbanzo's; Tokyo Joe's; and/or Noodles. Really need a better grocery option like Sprouts or Trader Joe's. Cleaner; better lit stores needed all around.
Parking; more diverse services
Adult clothing; variety sports shops; kitchen/bed/bath stores. National brand stores with better variety and pricing. Open walking downtown main street concept.
Often I'm not able to make it downtown during open business hours during the week and often travel on weekends. It would be nice to have maybe one day of extended hours; or after hours; for individuals who do not get off by 6 on weekdays.
Better hours and customer service. Most business especially are closed when I get off work. They are also not open until 10
More of a selection...or at least; a selection I would find appealing. There is little women's clothing to be found (Maurice's is cheap and geared towards girls who don't mind throwaway trends). NU2U is sort of grungy and the other consignment place is filled with stuff for old ladies. There's nothing really eclectic/hip downtown as far as clothing goes. Poppies sometimes has cute stuff; but overpriced and it's never a sure thing. Also; a record store would be cool (though I know this probably isn't financially viable) as would a real bakery (with bread; sandwiches; and pastries beyond a scant daily selection).
Variety of appealing businesses; prices; parking and driving down there especially during events is a whopping headache
More diversity of businesses
To be more cost competitive. We shop downtown often; but I won't pay double. I will pay more to support my local vendors but not double. Also hate earth; wind and fire. She has treated myself and friends like thieves any time we go.

The prices... I was in a clothing store the other day; I'll never go back 80\$ for a top doesn't worn here. Same with the kitchen store. Too expensive I got elsewhere.
A playground and more kid shops
Better service; hours; products; and prices.
More sales and specials; or lower everyday prices.
Expand the hours so that stores are open when I am not working. We need men and women's clothing stores for those of us over the age of 40.
Lowering the exorbitant prices
Outdoor seating; walkable alley ways; better decorations; more trees; better service and fair pricing.
A mall! Better advertisement.
Better selection; OPEN MORE days with LONGER HOURS!!!!
Clothing stores to cater to the older generations and plus size women/tall men.
Lower prices
A little more selection would be great; otherwise a larger paycheck... I love downtown! If there could be more cultural events that would be great as well.
Living in Laramie again.
Probably if stores had more promotions. Being a person in their early 20s; it can be hard to afford certain items downtown. I know the quality is fantastic; but I still don't make a lot of money to afford it.
Better parking
More time in my life to shop!
More clothing options.
Better parking and more selection with lower prices.
More options; better prices in stores; nicer clothing options; more curb appeal of businesses/community.
Big sales
A clothing store for womans/business clothes that was reasonably priced
More diversity
Better selection /prices
More parking
More affordable stores
More clothing stores
More young appealing stores. Places with good pricing... I'd love to have a Ross in Laramie for clothes and shoes. I really love Nu2u and sensuous she; even though one is a little on the pricy side.
More womens clothing stores
Being there
Greater selection and more hours. Stores typically open at 10 am and that's when I go to work. If they opened earlier; I would be more able to shop downtown.
to know what stores there are prior to walking around downtown; a sort of directory. and a dining guide would be nice; a catalog with all of the restaurants menu's
Better parking and hours
I'm already down town fairly often; more services/cheaper services for certain items. Favorite store is D&L Music -- they always greet you at the door; usually by name; and have since the beginning!
More diverse Clothing for non teen women. (Sensuous She is too expensive for me.) shoe store that is more affordable; though my husband shops downtown.
If there were shops that carried the items I need and want and were open after I leave work.
More bike paths to get from campus to downtown.
More clothing stores.
better hours; lower prices-- sometimes shoe prices are 25-50% higher than in Fort Collins with less selection.

Better hours and more selection at a reasonable price. I understand that the downtown businesses tend to offer higher quality items but I can't always afford the quality. Most of the time I frequent Cowgirl Yarns because I can go there on Monday night - I have been in the store less than a dozen times on other days of the week. I know that she carries high quality yarn but I usually can't afford to do an entire project at that price which means I have to find yarn online!
Better prices; more variety of stores restaurants. Would love to see a larger downtown grocery. I miss the Whole Earth Grainery! Shop at the co-op quite a bit; but wish they had more products. We really need more clothing stores in Laramie.
If the stores were open later and on Sundays; I love shopping downtown but most places are closed when I'm not at work.
More variety; clothing stores; and decent price points.
More variety of food and fun things to do like the arcade; etc.
Better parking and cheaper prices
Don't know
Better selection - the stores do not offer professional clothing and the gift selection is limited. It would be nice to have some attractive stores with a variety of clothing; gifts; etc. Also; our downtown is unattractive although clean. The murals are a huge help but Laramie could do better - 3rd Street is ugly with unattractive store fronts. Other WY communities have done a much better job - Thermopolis and Lander as excellent examples. It would be nice to have incentives for local businesses to spruce up their street appearance.
Easier parking especially during the meal hours. Better shopping options. Stores open later in the evenings - it is impossible to get off campus and downtown by 5:30.
clothing stores; including woman's and men's
More clothing stores would be nice.
If stores remained open later in evenings; even if they were closed another day of the week (e.g. Mondays) and open later on Friday and Saturday evenings.
Larger variety of clothing stores and more competitive prices.
Time
Friendlier merchants who didn't act like they were doing me a favor by "serving" me; wider selection of types of merchandise at a variety of price levels; more parking near where I'm shopping
Men's clothing
1. There is not a great variety of shops in Laramie. I suggest more clothing stores; more house decor stores; garden stores as a start. 2. Downtown looks shabby to me. Downtown is improving; but still has great room for improvement aesthetically. Plant more trees; redo 3rd St. as Grand was recently redone with landscaped medians; paint the Connor Hotel; hold business owners to making their businesses more attractive with planters; paint; facades; etc. 3. The restaurant service is usually TERRIBLE; with the exception of Sweet Melissa's. Most local restaurant owners/managers are not around and do not train their staff. I don't want to spend my money somewhere that has unprofessional; rude and slow service.
Better deals and merchandise that is geared to older (non-student) people and isn't ridiculously priced
nice small package liquor store with small but good selection (maybe the Coop could exploit this gap?)
Men's Clothing and other Household Supply store
If the downtown area were more accessible to people with disabilities. Off-street accessible parking is relatively scarce; and parking an accessible van on the street is difficult because of the angle between the street surface and the curb/sidewalk. There are still several stores with access problems. Prices are also higher; and selection is limited
Better prices; wider selection; nicer customer service; better parking.
I'd shop there if I had more money. :) I'd also like art studios that hosted classes like metal clay and glass fusing....but I trade the availability of those things for minimal traffic and safe neighborhoods! :)
Honestly; the Dance Center downtown made it easy to visit shops downtown; and plan ahead to be able to use them.

Better service and better prices...the customer service you receive in Laramie is some of the poorest I have ever seen.
clothing stores that are reasonably priced and appropriate for someone not anorexia or over 16 years old; men's clothing; another shoe store;
Easier in-and-out parking
Better advertisement of what is downtown
selection and value
If the hours were consistent. I can't recall how many times I have left work early to go to a store downtown before it closes at 5:00 to find out the proprietor decided to close the store for the entire day! No wonder people shop out of town.
More variety of goods; unique shops; better pricing; more selection of furniture; Sally's Beauty Supply; more restaurants with quality food
better parking and more clothing and novelty shops
It would be nice to have a few more women's clothing stores downtown. I used to buy a lot more down there before everything seemed to move out. I really like having all of the little restaurants downtown.
A wider selection of items. Many items seem overpriced because there is no competition; so when you need something and don't have time to either order online or go out of town; you have no choice but to pay the higher price. Restaurants are excellent!
More choices; better customer service; competitive prices.
More women's clothing stores.
restrooms!!
I think if it was more upbeat like the Fort Collins area with some nicer restaurants; specialty shops; etc. We have a few but it seems like there are nice stores next to junky looking stores. Fort Collins downtown always seems crowded and buzzing ... don't know how you get there.
Men's discount clothing stores Better weekend hours
Being able to afford things at Laramie prices.
Better variety of merchandise and if the store owners actually had sales! When we had the Small Business shopping day; a BUNCH of the stores didn't even do anything special for it! WHAT THE HELL?!
Service; price and selection that makes it a better deal to shop in Laramie than out of town or on the internet. Even considering time and fuel it's often cheaper to go to CO or Cheyenne then deal with the Laramie business community.
Better selection and hours
At least one store that carries a selection of women's clothing for someone over 18; including professional clothing (suits; dresses); most of the stores in downtown Laramie carry niche products; cater to the tourist trade; or can't keep enough stock on the shelves to be worth coming to; and I simply can't imagine ever shopping there on a regular basis.
If they carried the items I was looking for. Selection is very limited.
More variety of stores; longer hours
There needs to be more accessible parking spots and at several van accessible parking spaces for people with disabilities. The accessibility; in general; of downtown businesses and the areas for wheelchairs is so awful; the businesses and Laramie should be embarrassed. I have stopped shopping at many downtown business because of their lack of accessibility. As someone with many friends and family members with disabilities; I would rather go to the new Starbucks than downtown businesses because my friends can't park; can't get in the door; and can't use the restroom. This is the law; and I don't care about your historical building grandfathering excuses. Downtown Laramie should be accessible to EVERYONE who wants to enjoy it. Or; they are going to lose customers to other places with accessible physical structures and better attitudes toward disability.
A men's clothing store. Stores open in evenings and on Sunday. Better parking.

Variety of items that people go out of town for and competitive prices. (Look at the successes of the new outdoor outlet malls that are currently popular. Not saying we have to do that; but study why they are so successful.) Downtown Laramie has done great with better drinks/cocktail places and restaurants. Now lets see some focus on better shopping options that appeal to more people. Health/beauty supply; art/craft supply; reasonable priced home decor stores; more clothing (DEFINITELY); pet place? Would also love to see the downtown stores a little more pet friendly. Also some more greenery with some 365 day/year ambiance; not just around Christmas. Makes it more inviting and comfortable. Not so cold and stale. (Need that with our wind and weather) I know this is a lot; but any of these things are headed in the right direction. People WANT an inviting place to come and hang out with family and/or their pets; meet up with friends; and have all their shopping/eating/drinking needs met all in one area. It is proof positive when there are special events and these things are provided for that event. (Farmer's Market; Jubilee Days; etc.) There are always a lot more people. I see lots of pets; more food and shopping provided by brought in vendors; and more meeting up with friends due to these additions. What can we learn from these events to put in place on a more regular basis to keep downtown busy all the time. :)
More choice of men's clothing
Better Parking or easier walking. I'd love to see a downtown pedestrian mall.
don't know.
More clothing options
Advertisements and sales
I love coming downtown. I am just not a huge shopper - I do enjoy browsing and occasionally buy.
Greater variety of goods offered
More stores; better prices
More of a variety; men's clothing; women's clothing (other than Maurice's); home goods type shops (not antiques or thrift); more reasonable prices; better after work hours or weekend hours
I don't need much.
Wider variety of stores. Men's clothing would be a great addition.
Think twice about re-electing Paul Weaver.
Daily deals at bars and restaurants; more advertisement for things like farmers markets
Having a larger variety of clothing stores
Absolutely nothing! I love downtown Laramie just the way it is!!
More or better parking and better selection.
Time.
More If What I Need. Now Its More For Specialty items I Don't Need Regularly.
Open more/longer hours; women's / business clothing; better prices (I can buy the same pair of boots in a Fort Collins for sometimes 1/3 lower); not just cater to students but to the faculty who are here year round.
Probably not much. I shop it almost as often as I shop. If there were a pharmacy; a general grocery (but I do shop @ Big Hollow); what used to be called "notions" and is now generally called WalMart - but I don't want those stores downtown. Better prices; of course; but I know geography plays into that. And of course; there are and always will be; some cranky and unwelcoming merchants I simply don't want to patronize. BTW; your survey would have been better if it had included a 'near downtown' location. For instance; is Clure Brothers downtown? How about Rolling Tattoo? I decided yes.
I pretty much only shop downtown.

Appendix “C” Outreach Items

Retail Inventory

Initial postcards sent out to businesses:

Complete the survey and
be entered to win prizes.
Drawing will be held
weekly.



PLEASE COMPLETE SURVEY
BY JULY 1ST !!!

The Laramie Main Street Alliance strives to preserve historic
downtown Laramie while enhancing its economy and social
vitality!



In our ongoing efforts to revitalize downtown, we are updating our database of downtown buildings/businesses to better serve you. Please complete this survey **ONLY** if you are a downtown building or business owner. Individual survey responses will be kept **STRICTLY CONFIDENTIAL**. Your response will help make the case of why downtown is so vital to our local economy!

Follow the link below to take the survey online or scan the QR code above
www.surveymonkey.com/s/LaramieBizSurvey

Reminder postcards sent out to businesses:



REMINDER! Laramie Main Street Alliance Survey Deadline is August 1st!

Please take a few moments to complete the survey if you have not already done so!

Your response will be kept **STRICTLY CONFIDENTIAL** but we need your business information to complete our building and business database. Help keep Downtown Laramie strong!



Follow the link below to take the survey or scan the QR code above
www.surveymonkey.com/s/LaramieBizSurvey

Consumer Survey

Table tents in local restaurants:

<http://tinyurl.com/mqdu3o>

Help strengthen downtown's economic and social vitality.

We Need your input!

Scan this QR Code with your phone!



Downtown Consumer Survey



<http://tinyurl.com/mqdu3o>

Help strengthen downtown's economic and social vitality.

We Need your input!

Scan this QR Code with your phone!



Downtown Consumer Survey



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Help strengthen downtown's economic and social vitality.

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Downtown Consumer Survey

Scan this QR Code with your phone!



We Need your input!

Help strengthen downtown's economic and social vitality.

<http://tinyurl.com/mqdu3o>

Poster to draw people in at the UW Student Union:



Laramie Consumer Survey

Complete a survey for a chance to **win a \$50 giftcard** for downtown Laramie!



Scan the URL to complete on the go!

Announcement about the final presentation:

News Release

NEWS RELEASE - 10-22-14

*****FOR IMMEDIATE RELEASE*****

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Downtown Laramie Retail Market Analysis Report to be Presented

LARAMIE, Wyo. – Community Builders, Inc. (CBI) consultants Bobbe Fitzhugh and Megan Parker will present the draft Retail Market Analysis and Consumer Intercept Survey of the Laramie Main Street area to the Laramie Main Street Alliance (LMSA) and other stakeholders at a public meeting on Thursday, October 30th at 5:30 p.m. The meeting will be held in the Laramie City Council Chambers.

CBI is a community and economic development consulting firm based in Douglas. CBI was retained to give LMSA and the Downtown Development Authority (DDA) team a better understanding of the current retail, restaurant and service environment in downtown Laramie while identifying market opportunities and underutilized space. A separate piece of the analysis included a targeted survey of shoppers to evaluate consumer preferences, buying patterns and general attitudes about shopping in Downtown Laramie.

Some of the key findings of the study will be revealed at the meeting. According to Fitzhugh, "there are approximately 252 distinct business entities located in Downtown Laramie and 29% of those are retail businesses with another 11% dedicated to restaurants and "drinking places." It is estimated that a total of 465 full-time employees work in Downtown Laramie with another 313 part-time employees." She added, "Public art and murals, walkability of the area, the historic character and sense of safety were listed strengths. These are healthy indicators of the vibrancy that is Downtown Laramie!"

On the other side of the coin, parking and the threat of internet sales topped the list of major challenges facing Downtown Laramie. Consumers listed the higher cost and lower selection of merchandise and services and limited shopping hours to the "room for improvement" list.

All interested parties are invited to attend the presentation.

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