

March 9, 2023

# PROPOSAL FOR A DOWNTOWN RETAIL MARKET ANALYSIS

Submitted to the City of Cottage Grove, Oregon



**Submitted by**  
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**Contents**

Introduction ..... 2

Scope of Work ..... 3

City of Cottage Grove Participation ..... 6

Budget and Schedule..... 7

Experience and Qualifications ..... 9

Selected Relevant Projects & Clients (2017 – 2022) ..... 11

References ..... 13

Addendum A: Training and Implementation Services ..... 14



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March 9, 2023

Mr. Eric Mongan, AICP CFM  
City of Cottage Grove  
400 E. Main Street  
Cottage Grove, Oregon

Dear Eric,

I am pleased to share Marketek's qualifications and proposal for a Downtown Cottage Grove Retail Market Analysis. The Marketek team includes two long-time associates: Jenna Galbreath, research and marketing associate and Thatch Moyle, Principal of Urban Scenarios, who brings advanced data and opportunity mapping expertise.

In working with Cottage Grove, we will leverage and build on both the City's considerable downtown revitalization efforts and Marketek's track record of retail and business market analyses throughout Oregon as well as our understanding of local and regional economies. With our specialized knowledge of retail markets, place-based development, the visitor industry and community economic development we bring a holistic view of downtown Cottage Grove's future potential. Marketek's 1998 Downtown Cottage Grove market study and local market knowledge (as a consultant and visitor) enables us to hit the ground running to focus on the most relevant and meaningful challenges and opportunities.

Marketek's proposal responds to Cottage Grove's desire to strengthen and diversify downtown's retail and service base and to help existing businesses respond to an ever-changing consumer market. We value a high degree of community engagement and a highly interactive approach with City staff, the Downtown Cottage Grove organization, the Cottage Grove Chamber of Commerce and other stakeholders. Our proposal incorporates one-on-one connections and survey outreach to businesses and consumers, a fact-based market analysis, retail market strategy, key development opportunities and implementation/marketing tactics.

The Marketek team is excited to help downtown Cottage Grove stay on the forefront of market change and capture its best opportunities for diversifying the business base. Most importantly, I personally am eager to help downtown leaders build their capacity and confidence to move beyond research to getting results. I look forward to discussing the project approach, outcomes, and schedule with you.

Respectfully submitted,

A handwritten signature in cursive script that reads 'Mary Bosch'.

Mary Bosch  
Principal, Marketek

## Introduction

Now is the optimum time to take a fresh look at Cottage Grove's retail marketplace and the role of retail and services in downtown Cottage Grove. Over the last 25 years since completion of the Retail Market Analysis, the retail sector has evolved and changed in radical ways. Cottage Grove has continued to experience steady population growth and visitor traffic has returned to pre-COVID levels. Significant public and private investment—recent and planned—will spur increased customer foot traffic, business vitality and steady occupancies. The City and its partners are ready and eager to take a fresh look at the future role and potential for downtown Cottage Grove's retail base and overall business mix. A retail market analysis will help the community leverage these recent changes and provide strategic focus on 'what's next?' for downtown Cottage Grove.

Positive energy and momentum exist for downtown as a destination district for local residents and visitors. These factors together with a collaborative relationship among key organizations will ensure that the market study will guide focused action for a healthy downtown.

The consulting team will work with City staff, Downtown Cottage Grove and the Cottage Grove Chamber of Commerce and key stakeholders (property owners, brokers, businesses,) to provide a clear picture of downtown Cottage Grove's marketplace, opportunities, and best bets for retail and commercial business development. The proposed services will be conducted over three months based and will be completed by June 30, 2023 as required by project funding.

### **The process includes:**

- Review of all relevant plans and documents
- Tour of the community, downtown, and available buildings/sites
- Retail/service industry market research and analysis
- In-store visits
- Personal/phone interviews and focus groups
- Business and consumer surveys
- Best practice/case examples of economically vibrant downtowns
- Meetings/work sessions with City/stakeholders

### **Key deliverables include:**

- Retail market analysis including market, demographic and psychographic data necessary to market opportunities, and a supply/demand analysis
- Clear picture of the retail supply and demand balance within a defined trade area
- Identification of needs, interests and opportunities for Cottage Grove's small retail business community to succeed and priority strategies for the City and its partners to help implement
- Recommended approach for downtown business retention and expansion
- Target business mix and recommendations for downtown Cottage Grove's to encourage entrepreneurs to respond to the changing marketplace—greater pop-ups/mobility, creativity, flexibility

- Marketing factsheet/sample templates for implementation of study findings

## Scope of Work

Marketek's response to the RFP is organized by three phases with the specific RFP tasks called out within each. The phases are: 1. Discovery, 2. Market Opportunity Analysis, and 3. Economic Vitality Strategy. Some tasks within these phases may occur simultaneously.

### 1.0 Discovery Phase – Gather the Facts and Impressions

#### A. Project Initiation

- The project team will meet virtually with City of Cottage Grove and EDC to review process, confirm goals and deliverables, schedule community visit, and begin collecting data. (RFP TASK 1) Preliminary roles for the City follow the Scope of Work.
- Inventory and review all existing plans and documents from City, County, Downtown Cottage Grove nonprofit, Chamber of Commerce, Travel Lane County and others that are relevant to the market study. Ex: Comprehensive Plan, Downtown Cottage Grove Strategic Plan, City 2037 Vision-Action Plan.
- Develop a list of key stakeholders for contact during project and best approach to engage.
- Map out key milestones, project timeline, project communications approach and related activities for smooth project management.

#### B. Initial Site Visit

During this project, two multi-day site visits will be made to downtown Cottage Grove by Marketek. The initial site visit will include extensive field work:

- Walking tour of downtown, community tour, shopping center inventory, in-store visits, interviews and focus groups with business/property owners, City and organizations and other stakeholders to obtain input on market trends, recent/planned improvements, issues, challenges, and opportunities to doing businesses in Cottage Grove. (RFP TASK 2: STAKEHOLDER INTERVIEWS)
- Launch community and business surveys.
- Assess existing downtown competitive conditions and the business mix using Marketek audit framework.
- Inventory and evaluate existing downtown business base, key vacancies, opportunity areas/sites.
- Conduct a work session with City staff/downtown team to share preliminary findings and identify any information gaps.

#### C. Target Market Analysis (RFP TASK 3: LOCAL/REGIONAL MARKET TRENDS AND 5: MARKET PROFILES)

- Take the pulse of Cottage Grove's current economy and small business climate conditions including opportunities and challenges for business development. Included as part of the assessment will be identification of existing business clusters. Business

climate interviews will be conducted with recently located downtown or other commercial businesses to help evaluate business climate and the entrepreneurial ‘ecosystem.’

- Identify the primary geographic retail trade or market area for Cottage Grove—the area from which the majority of customers will potentially be drawn. Methodology includes interviews with key retail anchors both in the greater Cottage Grove community and downtown Cottage Grove, drive time estimates, existence of competitive shopping centers and other techniques.
- Using secondary data from public and proprietary data sources, prepare a demographic analysis of the Cottage Grove Retail Market Area, with comparisons to Lane County and the State of Oregon for the five-year 2023-2028-time frame. Included in this analysis will be: population and household growth trends; psychographic or lifestyle data, age, income, education and racial composition; and related factors.
- Quantify employees by industry in Cottage Grove as a key customer market.
- Incorporate visitor market information from the Chamber of Commerce, Visit Lane County, local hotel operators, downtown anchors and other attractions serving visitors. Depict traffic counts and economic impacts, as possible.

## 2.0 Market Opportunity Phase – Trends and Potential

### D. **Market Profile and Trends** (RFP TASK 5: RETAIL AND SERVICE INDUSTRY PROFILES)

- Provide a snapshot of national and main street retail/service trends including e-commerce, pop-up/mobile retail, experiential goods and services and the emerging niche of retail-tainment. Identify existing Cottage Grove businesses that exemplify key trends.
- Identify select comparable downtowns and gather information on downtown business mix and innovation. Further, provide select case studies of co-working spaces and entrepreneur incubators succeeding in downtowns.

### E. **Statistical Supply and Demand Analysis** (RFP TASK 4: MARKET GAP ANALYSIS)

A key goal of this assignment is to identify specific retail/service/other business opportunities for downtown Cottage Grove. This will result from the cumulative knowledge gained from all analyses—demographic, statistical and opinion research. To conduct a gap analysis for retail, restaurant and service uses, the following steps will be taken:

- Assess existing retail supply and statistical supply/demand balance in Cottage Grove to determine general retail gaps and market niches. Convert existing sales leakage to potential supportable retail space based on sales per square foot standards.
- Summarize the inventory and condition of major retail centers in Cottage Grove (and an overview of Eugene) with emphasis on size, location, tenant mix, vacancy rate and lease rate. Inventory will be used in identification of overall retail climate, types of retail available and missing and to identify opportunities for existing business expansion and new business creation.

- Estimate potential demand for new retail space in the Cottage Grove market area over the next five years based on projected household growth, household spending patterns and sales per square foot standards. Demand for potential new store space will be provided by the type of merchandise/service, including shopper's goods, convenience goods, personal services and restaurants. Incorporate e-commerce data as online sales will influence retail space requirements.
- Apply potential capture rates for the downtown Cottage Grove area demand figures to estimate potential support for new retail space by merchandise/service category in Cottage Grove.
- Using ESRI Business Information Solutions' Spending Potential Index, characterize retail market area spending patterns compared to national averages. This information adds another dimension to the retail potential and lifestyle analysis and is helpful in identifying an appropriate business and merchandise mix for Cottage Grove shopping centers.

#### **F. Opinion Research**

To augment the data, Marketek will conduct focus groups and electronic surveys of Cottage Grove small businesses and residents to understand their needs and interests, perception of retail opportunities as well as downtown marketing and branding themes.

- Conduct 3-4 focus groups with key target audiences: downtown business/property owners, visitor industry representatives and other key stakeholders. (REFERENCED IN TASK B1 ABOVE)
- Prepare online surveys suitable for self-administration by local businesses and consumers to understand downtown shopping habits, consumer preferences and business needs and interests.
- Identify best marketing and publicity tactics to achieve desired participation (>150 responses for community survey and >50 for business survey.)
- Summarize results of surveys and ways to follow-up with information and business assistance, as desired.

#### **G. Target Businesses/Niches** (RFP TASK 4: MARKET GAPS)

Based on the retail assessment, stakeholder knowledge, retail trends, survey research, the statistical market analysis and team knowledge of the retail market, identify business mix and updated market position statement for downtown Cottage Grove. Identify the top five business and/or merchandise targets for marketing.

### **3.0 Economic Vitality Findings and Strategy Phase**

(TASK 6: DRAFT FINDINGS AND PRESENTATION)

In this phase, Marketek will prepare business development recommendations for downtown Cottage Grove, focusing both on strategies aimed at helping existing businesses expand or redevelop, and on ones that seek to recruit new businesses to fill market voids. Include suggestions for how to leverage potential partners and collaborators.

#### **H. Business Development/Marketing Strategy**

- Based on market study findings including issues and opportunities identified by the local business community, recommend strategies for increasing sales to existing business.
- Identify and evaluate key opportunity sites (properties and buildings) for potential repurposing and/or business location. Information will be gathered from site visit, focus groups, interviews and preliminary data gathering.
- Map downtown Cottage Grove's key assets for improving economic vitality.
- Provide general location guidelines for retail businesses to capture increased sales from target markets. Provide observations about identified opportunity sites regarding characteristics and 'best bets' for business location.
- Identify potential roles and responsibilities for key business development activities—City staff, Main Street, other key organizations. Provide direction and next steps on how the City and its partners can put the results of the market study to work. This includes how to work with established Cottage Grove businesses, encourage start-ups and attract new business. See also J. Marketing Implementation Guide.

#### **I. Presentation of Findings**

- Prepare a draft written report documenting all aspects of the market study. The body of the report will highlight findings and how to use the market study and next steps for realistic actions that encourage appropriate retail development. The document will use a graphic presentation style for easy reading.
- A PowerPoint presentation of findings will be prepared and delivered at an Open House to the City of Cottage Grove, project partners/stakeholders and the community, if desired. (RFP TASK 6)
- Prepare final report. (RFP TASK 7)

#### **J. Marketing Implementation Guide**

- Prepare a business development implementation plan focusing on short- and longer-term actions for business retention/expansion, entrepreneur - business attraction, property readiness and organizing the downtown economic vitality team. Incorporate steps to promote key opportunities to business targets and 3rd parties, to develop a list of target prospects; and to keep moving forward via a clear timeline, roles, reporting results, etc.
- Develop a marketing factsheet that highlights downtown opportunities and provides simple attention-getting information on 'why locate in downtown Cottage Grove.' Expand on this with a talking point guide. Provide a sample property sheet to demonstrate how to link business opportunities to strategic locations.

*A menu of additional, optional services appears in the Budget section below.*

## **City of Cottage Grove Participation**

Marketek and City staff will collaborate throughout this assignment. We would rely on the City for the following assistance.



- Publicize the project within the community to “pave the way” for the consultants’ community visits and facilitate as much public input as possible. This includes providing the required notice of public meetings, if applicable.
- Provide names and contact information for key stakeholders and businesses to interview.
- Set up any special interviews, for example, with Mayor and Council members
- Invite stakeholders to focus groups, work sessions or presentations.
- Publicize any public presentations.
- Promote the community and business surveys and provide links on the City website.
- Provide information as available on: recent and upcoming downtown investments, commercial permitting trends, key opportunity sites, business trends and related information to provide context for downtown Cottage Grove.
- Provide or arrange for public meeting space.
- Provide or arrange for workspace (if needed) for consulting team while on-site.
- Read and comment on draft documents.

## Budget and Schedule

We estimate the project can be completed within three and a half months and by no later than June 30, 2023. Marketek is prepared to begin work immediately upon contract execution and authorization to proceed.

The tables below present project staff hourly rates, the budget by major project element and proposed timeline for completion of project tasks. The schedule is based on the proposed tasks and activities, timely scheduling of interviews, community visit, and access to data.

### Team Hourly Rates

Position Title	Personnel Name	Hourly Rate
Principal	Mary Bosch	\$150
Senior Research Associate	Jenna Galbreath	\$100
Associate Planner	Thatch Moyle	\$150

Type of Expense	Estimated Cost
2 in-person trips to Cottage Grove from Portland (mileage)	\$340
Lodging – 3 nights	\$350
Meals	\$150
Data purchases/Survey Monkey subscription	\$300
<b>Expenses Sub Total</b>	<b>\$1,140</b>

Phases/Activities	Budget	Mo.1	Mo.2	Mo.3	Mo.4
1.0 Discovery Phase	\$4,900	✓			
2.0 Market Opportunity Analysis	\$6,750		✓	✓	
3.0 Economic Vitality Strategy/Report	\$5,500			✓	
Project Management/Team Meetings/Client Communications	\$850	✓	✓	✓	✓
Professional Fee Subtotal	\$18,000				
Estimated Out of Pocket Expenses	\$1,140				
<b>Total Budget</b>	<b>\$19,140</b>				

Additional Services	Estimated Fee
Additional Property/Target Business Marketing Sheets (each)	\$750
Property/Site Pro Forma (each)	\$1,759
Customized Workshops (see Addendum A)	\$2,000-\$3,000 ea
Business Retention/Expansion Program Roadmap	\$3,000
Business Attraction Program Roadmap	\$3,000
Drafting Target Market/Promotion Campaigns for key products or customer markets	\$1,500
Marketing Implementation Assistance (various)	\$150/hr

## Experience and Qualifications

Marketek, Inc. is a market analysis, economic development and planning firm with deep-rooted experience in downtown and neighborhood development services. Since its founding in 1984, Marketek has pioneered a practical, hands-on approach to community economic revitalization, helping to transform hundreds of communities. Building a strong, vital business district is determined in part by its support from the surrounding community and other target markets. Our rigorous market research, which we combine with innovative, customer-directed marketing concepts, results in achievable, specific action plans that create vibrant and economically sustainable communities and business districts.

Over the last 35 years, Marketek has prepared commercial and mixed-use market analyses, redevelopment strategies and marketing plans for over 350 communities and business districts throughout the nation. Over one-third of our assignments come from repeat client business. Part of our success is linked to our commitment to identifying unique factors associated with a development or neighborhood business district that will enable them to draw a variety of customers. Our community-based approach to planning and research often leads to creative public-private collaborations during strategy implementation.

Marketek's key services follow:

- Market analysis: retail, residential, office, lodging
- Economic revitalization strategies
- Business recruitment
- Business retention & expansion
- Strategic planning
- Target marketing strategy
- Consumer research & analysis
- Marketing/branding strategies
- Public involvement
- Economic assessment
- Organizational development/training

Marketek's principals and associates draw on extensive backgrounds in community development, real estate development, urban planning and marketing to provide comprehensive services for development, redevelopment, turnaround and enhanced management opportunities and challenges. Our clients include national development organizations, public agencies, industrial corporations, commercial developers, builders, financial institutions and non-profit institutions.

In addition to a wide range of economic development experience, Marketek has conducted retail, office, hotel, industrial, all types of residential, retirement and mixed-use assignments. As a national firm, we have consulted throughout the United States, learning from the best practices of dozens of cities and staying abreast of national trends and innovations in the development industry.

Our work is guided by our passion and commitment to make local communities the best places to live. Marketek operates with a small staff believing that the success of a consulting firm is based- on the experience, capabilities and project participation of its principals, the quality of their work and satisfaction of their clients. We are selective in the assignments we accept to ensure that clients receive the highest quality market and feasibility analyses for the best value. Our "hands-on" approach typically results in continued involvement in the community or development long after a project or plan is completed.

## Mary Bosch, Principal, Marketek



Mary Bosch, principal of Marketek will lead all project phases and will have 100 percent project management responsibility for the Downtown Cottage Grove Retail Market Analysis. Mary is a market analyst and economic developer experienced with every facet of the business development process – from the perspective of the entrepreneur to the developer and marketing professional. Through her work on economic revitalization assignments throughout the nation, Mary has acquired a strong understanding of what it takes to rebuild a community’s commercial and economic base.

Since beginning her consulting career over 30 years ago, Mary has completed market research, business development and economic development assignments throughout the U.S. She is an experienced community facilitator holding numerous town hall meetings, visioning workshops, focus groups, and stakeholder interviews. Mary has led over 50 trainings and workshops on market analysis, business recruitment/retention, and business district planning for local and state economic development and Main Street organizations. Mary served for numerous years on the board and as Marketing Chair of the Oregon Economic Development Association.

Mary’s special expertise is downtown/commercial center economic vitality deep experience in preparing economic development roadmaps, retail market analysis, business retention and recruitment game plans, business district plans, niche marketing strategies, and cluster planning. A snapshot of her downtown experience includes:

- Led over 300 downtown economic and business vitality projects in 15 states working with state and local Main Street Programs and the National Trust for Historic Preservation, National Main Street Center
- Consulted on Main Street Economic Vitality– business attraction, retail market analysis, business attraction, organizational training and capacity building
- Provided hands-on technical assistance including trainings and workshops to 65 Oregon downtowns through Oregon Main Street and Oregon Downtown Development Association (former statewide nonprofit)

She holds a Master of City Planning, Georgia Institute of Technology and a BA Communications, Indiana University, Bloomington.

## Thatch Moyle, Urban Scenarios



With over 22 years of domestic and international experience in land development, feasibility analysis, geospatial analysis, 3D visualization and modeling, scenario planning, and stakeholder involvement, Urban Scenarios’ founder, Thatch Moyle, understands planning issues and how policy decisions directly impact communities and regions.

Urban Scenarios focuses on responsibly managing urban growth. With the majority of American urban areas experiencing growth and migration comes an influx of people, issues of affordability, diversity, and congestion.

Urban Scenarios was founded to help decision-makers find new ways to envision solutions, make choices for an equitable, sustainable, and resilient future, and communicate the vision.

Urban Scenarios uses modern tools to address modern problems, harnessing geospatial “big” data and applying progressive urban planning methodologies to create easy-to-understand models that help all stakeholders understand the impact of policy decisions, assess investment opportunities, and envision future growth in cities and towns across the globe.

Thatch is experienced in all aspects of development including project management, due diligence and feasibility studies, downtown and subarea planning, project entitlement, and GIS-supported modeling and analysis.

His background in land use planning and project management is supported by a vision for collaborative input to achieve quality design and project consensus. As a planner and project manager, he has been involved in international and domestic projects for both private and public clients. These projects include master planning for districts and regions, office parks, industrial sites, retail centers, downtowns and main streets, municipal facilities, and single-family and multi-family residential developments.

**Professional Affiliations** American Institute of Certified Planners  
American Planning Association, Oregon Chapter  
Woodstock Neighborhood Association, Land Use Committee

**Education** B.A. in Economics from Willamette University  
Masters Urban and Regional Planning from University of Colorado,  
Denver

### Jenna Galbreath, Research and Marketing Consultant



Jenna has served as a Research and Communications Associate with Marketek for nearly a decade, assisting with target market research, communications and marketing strategies, and social media planning on over 30 Marketek projects spanning consumer, retail, and industrial/B2B focuses.

Additionally, she brings 10 years of agency experience and a data-driven lens to communications, public relations, and marketing, where her clients range from Main Streets and businesses to multi-national Fortune 500s. She regularly conducts digital, earned, owned, social and secondary research to answer complex questions and better understand the landscape to set marketing and communications strategies

Her expertise lies in bridging the worlds and uncovering insights at the intersection of data, cultural context, and communications strategy. Jenna holds a bachelor’s degree in International Studies and master’s degree in Strategic Communications from University of Oregon.

### Selected Relevant Projects & Clients (2017 – 2022)

- Main Street Strategic Planning Assistance: Warrenton, Yamhill, Port Orford, Woodburn, Albany, Willamette District, Pendleton (2020 – 2023)
- City of Fairfield, CA Commercial Centers Inventory and Analysis (2022-2023)
- Statewide Business Analysis for Restore, Oregon to guide their assistance to long established (historic) business anchors, (2022)
- Downtown North Plains Master Plan (with MIG consultants), (2022)

- North Marion County Visitor Strategic Marketing Strategic Plan (2022)
- Downtown Roseburg Healthy Foods Grocery Analysis refresh (2022)
- Retail/Office Market Analysis Update, City of Lake Oswego (2021)
- Heart of Fairfield Retail Market Analysis and Strategy, Fairfield, CA (2020-21)
- Cañon City, CO Market Opportunity Analysis (2021)
- Food Makers Incubator and Community Event Feasibility Study, City of Othello, WA (2021)
- Rekindling Your Main Street Program, Woodburn Downtown Association (2020-21)
- Business Retention Strategy and Program Development, City of Canby, OR (2021)
- Craft Beverage Trail Feasibility Study, Charleston, WV for Robert Byrd Institute (2020)
- Glenn and Tehama County Opportunity Sites Analysis (2020)
- Business Retention Strategy and Program Development, City of Wilsonville, OR (2019)
- Federal Way, WA Retail/Target Market Opportunity Analysis, City of Federal Way, WA (2019)
- City of Los Banos Opportunity Sites Analysis StoryMap (2019)
- Downtown Chico, CA Retail Market Update and Action Strategy (2019)
- Market Update and Business Mix Refresh for the Portland Mercado, Hacienda Community Development Corporation (2019)
- Downtown Historic Theatre Redevelopment Feasibility Studies with Historic Theatre Consultants, Effingham, IL (2022), Thomas, WV (2020), West Bend, WI (2018)
- The Historic Waldron Building Redevelopment Feasibility Study, The Dalles Main Street, OR (2019)
- Visitor Market Assessment, Opportunity Site Analysis and Strategic Action Plan, Kings Canyon Highway, Fresno, CA (2019 with Chabin Concepts)
- Downtown Roseburg, Oregon Grocery Market Update and Prospecting, (2018-2019)
- Broadway Neighborhood Corridor Commercial Assessment, Portland, Oregon (2019)
- Retail and Mixed-use Site Assessment, City of Benicia, CA (2019 with Chabin Concepts)
- Oregon Main Street Program Economic Vitality Assessments for Stayton, Bandon, Roseburg (2018-2019)
- Clackamas Oregon Business and Economic Development Department, Business Retention and Expansion Strategy (2018)
- Retail/Economic Hub Analysis, City of Martinez, CA (2018 with Chabin Concepts)
- Visitor Market and Downtown Assessment and Action Roadmap, City of Kingman, AZ (2018 with Chabin Concepts)
- California Main Street Conference: *Telling Your Economic Vitality Stories for Business Development* (2018)
- Retail Market Analysis, City of Owasso, OK (2018)
- Downtown Retail Market Analysis, Business Development Plan and Marketing Campaigns, City of Hillsboro, OR and Hillsboro Downtown Partnership (2017 and ongoing implementation assistance)
- Downtown Veneta Retail and Opportunity Site Analysis and Marketing Plan, (2017-18)

- Oregon Main Street Conference Presentations: Economic Vitality Refresh Strategy, Growing a Healthy Retail Base, Pop-Up Retail Attraction, Transformation Strategies for Success

**In sum, the Marketek team offers the following key qualifications which we believe distinguish us from other downtown, retail revitalization and economic development groups:**

We are small business whose principal and staff members will provide timely attention to Cottage Grove's local needs. All work will be completed by top-level professionals with a deep base of local knowledge.

We have extensive experience working in downtowns and neighborhood districts with a variety of local stakeholders. We work closely with those responsible for project implementation to ensure plans are understood and supported.

We offer a depth of experience in developing economic assessments, business development plans and marketing strategies aimed at reviving downtown areas. We have brought this experience to bear in downtowns large and small across Oregon, California, Washington and beyond.

We understand economic, business and real estate development from multiple perspectives, including that of developers. This view enables us to pursue realistic and implementable action plans.

## **References**

**1. Karla Antonini, AICP, Economic Development Project Manager**

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**2. Sheri Stuart, Coordinator, Oregon Main Street**

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**3. Jamie Johnk, Economic Development Director**

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# **Addendum A: Training and Implementation Services**

## **A. Putting Customer/ Retail Market Data to Work in Your Business**

A workshop presentation for existing business owners will be developed focused on the applying the results of the market analysis through target marketing, changes to merchandise and promotional tactics. Following the workshop, time may be available for selected individual business consultations focused on merchandising, target marketing, promotions and more.

## **B. Business Development Workshop – Market Based Economic Vitality**

A sound business expansion/prospecting program has as its foundation the market analysis, store-type recommendations, a well-defined market position, business district development plan and recruitment information. With these tools in hand, a downtown program will be ready to recruit retail and other commercial businesses. The recruitment workshop proposed below will help key stakeholders in each business district develop or strengthen a knowledgeable local sales team and with the ability to sell. The workshop includes a detailed workbook and will focus on the following topics:

1. Responsibilities and Challenges of the Business Development Team
2. Establishing Priorities for Recruitment
3. Promoting Business District Real Estate
4. Prospecting for New Business--Traditional and non-traditional marketing methods
5. Putting It All Together---Retail Business Development Plan for Your Business District

## **C. Location, Location, Location—Business Clustering Principles and Practices**

How can you think and act like a shopping center when you're not? This workshop will focus on the value of business clustering and tactics to find the best location for business. The downtown district team will identify existing clusters in their downtown, how to build upon those while dealing with 'difficult properties.' Tools and tactics will be shared regarding how to package and promote downtown's commercial development opportunities to existing property owners and outside developers, how to deal with absentee, out of town property owners, how to approach difficult properties and overcome barriers to investment.

## **D. Marketing Your Business District**

This hands-on workshop focuses on strategies for image enhancement and target market attraction for downtown districts. Marketek will present marketing/promotional strategies and tactics successfully applied in other communities for the business district and make concrete recommendations for Downtown districts related to: Physical Image, Desired Image, Customer Marketing, Business Marketing and related topics. Ideally, city representatives and key downtown stakeholders would volunteer as members of a core promotion team or committee to initiate implementation of the marketing plan.

## **E. Will My Project (Business Expansion) Succeed? Taking the 5 Steps to Determine your Project's Feasibility**

Whether you are a business or a nonprofit seeking to expand your products and services or a community group with a big vision (Recreation/event center! Commercial kitchen! School building conversion!) or smaller idea (Day care, youth programming, grocery co-op), the fundamental questions



remain the same:

*What's the demand (target market)? How much will people pay? How often? What's the competition (supply)? What are the keys to success?*

Understanding the feasibility of your project is a basic step to deciding whether to move forward, to building a solid business plan and gaining project support. This workshop lays out the questions, the steps, the local project team, and the timeline for your project market study. What data do you need and how do you get it? How do you 'test' market support? How do you pull all the information together to target your best opportunities for success?

## **F. Stimulating Retail Development from Within the Neighborhood- New & Tried & True Models**

Retail business incubators, local 'bootstrap' partnerships, arts/retail co-ops, economic & community impact analysis, and proactive, innovative incentives are a few of the tools communities are using to redevelop their commercial districts. Learn how communities are successfully using both cutting edge and retooled 'tried and true' strategies to help re-energize their downtowns. The case studies will highlight successes from a variety of community sizes and capacity levels.

## **G. Targeting Your Business Mix: *Putting Together a Realistic Game plan!***

Everyone wants new businesses in their district, but program managers often wonder: what's the right approach? How do I know my business targets? What marketing tactics are appropriate? Attendees will learn about traditional and nontraditional approaches to business development and how to leverage relationships with other downtown stakeholders to build a successful recruitment team. Goals are for participants to:

- 1.) package their district's assets and market data for an effective recruitment strategy
- 2.) identify and target the business/product mix suited to the district
- 3) outline the marketing, prospecting and sales tools and techniques to 'close the deal.'

## **H. Retail and Residential Market Analysis: *Key to Mixed-Use Marketing Success!***

Market analysis is a fundamental tool for marketing both retail and residential opportunities in your district. What are the steps? What data do you need and how do you get it? How do you pull it all together to target your best opportunities for success? This session will focus on the information available, how to gather it and how to apply it to fill ground floor vacancies with retail and upper stories with housing for a truly mixed-use downtown environment. Participants will:

- 1.) know the most fundamental steps of a market analysis—retail and residential
- 2.) identify the best market data and how to apply it
- 3) get started on the marketing and sales process

## **I. Asset Mapping Your Commercial District**

Instead of focusing on all the barriers or challenges to positive change, this workshop helps participants

focus on the many physical, human and capital assets and resources they have at their fingertips but often disregard. When positive elements are highlighted, great connections can be made and a whole new approach to district revitalization may be generated!

## **J. Branding: Promote Your Business District's Unique Identity**

Create a practical approach to developing your district's brand through:

- The Branding Process – what's your story?
- Success factors—community, downtown, regional
- Creating Your Brand Identity Statement—*Get Started!*
- Implementing Your Brand
- The Branding Communications Plan: Key Elements, Steps, What is Your District Ready to Take On?
- Brand Team: Will you have a brand keeper? Who will have final say whether programs and communication are consistent with the brand strategy?