West Waterfront Area Redevelopment Plan & Implementation Strategy
City of Sturgeon Bay, Wisconsin

WRA Final Draft: August 15, 2011
Prepared by Vandewalle & Associates
# Table of Contents

Plan Purpose & Objectives ........................................................................................................ 3  
Background ............................................................................................................................. 5  
Redevelopment Plan Recommendations ............................................................................. 9  
Implementation Strategy ....................................................................................................... 18  
Appendices ............................................................................................................................ 20
Plan Purpose & Objectives
The City of Sturgeon Bay partnered with Door County Economic Development Corporation (DCEDC) to prepare this Redevelopment Plan and Implementation Strategy as a means of advancing revitalization in the Sturgeon Bay West Waterfront Area. The West Waterfront Area is an underutilized stretch of prominent waterfront located at the western approach to two bridges, the Maple-Oregon St. and Michigan St. bridges, which connect Sturgeon Bay’s central business district. The area is a key connection for residents, businesses, and visitors from throughout the region, as just one other bridge, the STH 42/75 bypass, connects the mainland to northern Door County.

The West Waterfront Area is an economic development priority for the City and the Waterfront Redevelopment Authority. The area includes various potential redevelopment sites which the City identified through earlier plans and the development of TID#2. In their current state, these sites are underutilized and, given their prominence, also impact the economic vitality and appeal of the western part of the City more broadly.

Redevelopment sites include the City-owned former U.S. Coast Guard site and adjacent former Door County Co-op site; a vacant restaurant; and several properties on the first block inland from the bay. The entire West Waterfront Area lies within TID #2.

The purpose of this project is to create a Redevelopment Plan and Implementation Strategy that establishes a vision for private sector reinvestment, enables the City to strategically plan and implement public improvements in support of its long-term vision, and takes the first steps in advancing plan implementation.
Goals guiding project development include:

- Encourage higher and best uses for prominent, valuable waterfront sites;
- Develop a busy, highly functional waterfront area for community residents;
- Improve the City’s appearance and welcome visitors to the community;
- Improve public access to the waterfront; and
- Position the City to move quickly in a rapidly-changing and challenging economy to advance business development and reinvestment.

The *Redevelopment Plan & Implementation Strategy* sets the stage for short and long-term redevelopment and will help communicate the City’s market-feasible vision with businesses and developers, property owners, and residents.

For this project, the City leveraged State of Wisconsin Community Development Block Grant (CDBG) funds, matched with City and private property owner funds.
Background
The City undertook this West Waterfront Area planning effort to advance and expand upon prior planning efforts impacting the area, including the City’s Sturgeon Bay Downtown Waterfront Subarea Development Plan (2003) and the City of Sturgeon Bay Comprehensive Plan (2010). In addition, the relocation in 2011 of the U.S. Coast Guard station and closure of the Co-op created new redevelopment opportunities in the area and increased the importance of proactive area-wide planning.

The West Waterfront Area planning process commenced in the spring of 2011 and continued for several months. The City retained Vandewalle & Associates, a Madison and Milwaukee based planning and design firm, for the project. Project tasks included due diligence (gathering and reviewing of existing materials including past plans, maps, and parcel data, and conversations with property owners and other stakeholders); research and feasibility analysis; development of a Land Use Plan; preparation of a design concept sketch; and development of an implementation strategy. Throughout the planning process, interviews were held with stakeholders, including property owners and community leaders, to gather information and opinions regarding the project area. In addition, several meetings were held between City Staff, Door County Economic Development Corporation, and Vandewalle & Associates during plan development.

Area Context & History
Within the Sturgeon Bay community, the West Waterfront Area is the working waterfront directly across the Bay from the traditional downtown and more tourist-oriented activities. The
West Waterfront Area’s history and present use reflect a working waterfront of industry and national security. Properties within the project area have historic uses including the storing and transporting of seed and feed, and lumber mills. Icons of this past uses remain today including most notably the granary tower still standing at the former Door County Co-Op site. The U.S. Coast Guard continues to operate in the project area, now from a new, consolidated facility—opening the former spaces for new redevelopment. Other former uses along the waterfront and in the surround inland blocks include supporting industries and commerce such as craftsman workshops, banking, retail, and hotels/lodging.

Prior Plans & Identified Community Needs
The Sturgeon Bay Downtown Waterfront Subarea Development Plan, completed in 2003, established a vision for Downtown that was developed through significant public involvement before adoption by the Sturgeon Bay Waterfront Redevelopment Authority. The vision includes promoting a diversity of uses; opening up the waterfront to the public, extending a waterfront walkway, and promoting waterfront activities, amenities, and commerce; maintaining and enhancing view corridors; and promoting rehab and reuse of existing structures and 2+ story new construction. The vision also provides general design guidelines.

This West Waterfront Area Redevelopment Plan & Implementation Strategy develops an actionable land use plan and strategies to further this vision and facilitate the proposed development and redevelopment.

The 2010 City of Sturgeon Bay Comprehensive Plan, in addition to developing a smart-growth strategy for the City, takes a closer look at west side waterfront enhancements, specifically Maritime Museum expansion opportunities and the former Door County Co-op site. The Plan provides general development/redevelopment recommendations for specific use areas within the west side waterfront, including Downtown-, Transitional-, and Tourist- Commercial, Single-Family Residential, the former Door County Co-op site, the former West Side School, and Roen Salvage property.

The Comprehensive Plan’s recommendations helped guide this detailed West Waterfront Area land use plan and conceptual design.

During the City’s Comprehensive Planning update process, a community-wide household survey was conducted in March 2008 to obtain resident opinions related to Comprehensive Plan topics. Community needs, which residents would like to see better met within the community, were one topic of the survey. Resident needs can potentially be met through the West Waterfront Area, so were considered during this West Waterfront Area planning process. Based upon community input, the Comprehensive Plan indicates that there are limited activities and opportunities in the City for youth. Respondents felt the community lacks a true community center, including a place (aside from resort-type private facilities) to gather and to rent rooms for family and other events.

The Comprehensive Plan also identified that the top 3 desired downtown uses indicated in the March 2008 community survey included, in order of respondent interest: specialty retail; mixed-use residential & retail development; and offices.
Market Assessment

Sturgeon Bay as a destination as well as year-round market is hard to measure with typical market analysis tools. In particular regional transportation connections have a key impact in Sturgeon Bay.

The recent expansion of Highway 57 will greatly impact the Sturgeon Bay market as travel time and traffic flow between Sturgeon Bay and Green Bay is much more efficient. The expansion opened up a more practical commuter opportunity to live in Sturgeon Bay and work in greater Green Bay, which could help draw new residents and also provide new opportunities in a larger job market for Sturgeon Bay residents. The expansion will also impact the retail market within Sturgeon Bay. While Green Bay is now an easier trip and more practical shopping alternative for some residents of the Sturgeon Bay Local Market Area, Sturgeon Bay’s unique retail and recreation opportunities are now equally more accessible to residents of the greater Green Bay metro area.

In the plan development process, local and regional developers were interviewed to gain an understanding of the marketability of the Sturgeon Bay community and the specific West Waterfront redevelopment area. Developer feedback suggested that this is a prime redevelopment site, a landmark opportunity for the community. Even in a challenged financial market, there was strong belief that this area could be redeveloped with a phased approach starting with the catalytic Co-op/coast guard site.

In addition, ESRI Biz Market data was reviewed to better understand the statistical data available to gauge the West Waterfront Area’s relationship within its market. Full data is provided in Appendix 1. Overall, the area has a greater supply than demand in the major industry areas of Retail Trade and Food and Drink, meaning that the retail potential of the Local Market Area is more than met by current supply. However, this analysis does not take into account that the Local Market constitutes only a portion of the demand realized in Sturgeon Bay for dining, drinking, and retail, and that the market is highly-impacted by out-of-market tourism. The retail, food and drink market opportunity brought to the area by visitors, which constitute a substantial part of the Local Market Area’s economy. Industry groups which benefit strongly from visitor dollars, from eating and drinking establishments, to gas stations, to sporting goods and hobby stores saw greater retail sales than would be demanded by the Local Market Area alone. In this way, the ESRI Biz data reinforce the area’s role as a visitor destination, drawing spending dollars from outside the area.

According to ESRI estimates, total retail sales within the area delineated by the Local Market Area amount to about $303 million; based on the population and income within the Local Market Area, total retail demand from within the Local Market Area is about $285 million. Drawing even more spending from outside the Local Market Area are food & drinking establishments. In this group, total sales within the Local Market Area amount to about $64 million, while demand from the Local Market Area is only about $44 million.
There were a number of industry groups for which, in contrast to the area’s overall surplus, there was a retail leakage to areas outside the Local Market Area. In general, these industries are not well-suited to the West Waterfront Area. They included automobile dealers, furniture stores, electronics & appliance stores, building materials and supply stores, and clothing stores, among others.
Redevelopment Plan Recommendations

The West Waterfront Area Redevelopment Plan provides recommendations based on analysis of the City’s local assets, the feasible market, and the community’s role in the greater Door County regional economy. The Redevelopment Concept Plan illustrates the location of recommended land uses and how they fit into existing development. The Concept Perspective provides a more illustrative vision of how new uses might look and feel, and fit into the fabric of the waterfront area.

Area Character

The West Waterfront Area today is a true working waterfront with ship restoration; views of the Bay Shipbuilding Company Shipyard; U.S. Coast Guard operations; tugboats; Harbor Club Marina; boat tours and rentals; transient docking; a public boat launch; the Door County Maritime Museum; and other businesses and amenities. These uses are an extension of the historic uses of the area, which included U.S. Coast Guard operations and industry including a granary and lumberyards.

The character envisioned for the West Waterfront is to remain a working waterfront closely tied to water uses, connected to the activity and employment of nearby Bay Shipbuilding; and providing a mix of services and activities that serve local residents. In fulfilling these roles, the area will naturally function as an appealing attraction for visitors and passersby as well and present a positive image of the community. The heart of Downtown, with many civic uses, attractions, businesses, tourist lodging and other amenities, will remain on the eastern side of the Bay. The West Waterfront Area will complement the Downtown, offering additional services and amenities that are used heavily by City residents, with a few key attractions such as the Marina and Maritime Museum that reinforce the waterfront character of the area and which draw visitors over to this side of the bay.

Existing uses remain key elements of the future vision for the area, including the U.S. Coast Guard (relocated immediately south, within the West Waterfront Area); Door County Maritime Museum; Harbor Club Marina; boat tours, rentals, docking, and launching. Bay Shipbuilding Company, adjacent to the West Waterfront Area, is also poised for continued prominence in the area. In 2011, Fincantieri Marine Group (FMG), the owner of Bay Shipbuilding, announced new contracts which reinforced the commitment made in 2009 to an aggressive upgrading of the shipyard. Bay Shipbuilding specializes in new-build commercial ships and ship repair services.

While many current uses are poised to remain and/or expand in the West Waterfront Area, there are a number of redevelopment and infill sites which provide an opportunity to strengthen the working waterfront character and integrate new land uses which will generate additional activity and business in the area. Public enhancements can also improve the appearance of and movement through the area, creating an appealing environment for activity and new investment. Design features, signage, and other public amenities can also further reinforce the West Waterfront Area’s character as a working waterfront/nautical area and raise its profile as a resident and visitor destination.
Relationship to surrounding uses

At each of the priority sites, new development should relate to the area’s key assets – including the Bay and Madison Avenue; to the form of existing development; and to other new developments as a means of implementing the vision for a cohesive, active, waterfront-oriented area. Proposed new uses, including lodging, commercial, and residential development, should complement the existing businesses in their design and site orientation to provide a safe and appealing walking district with good connection between the places where people live, eat, shop, and recreate. Existing uses which play a key role in the area and to which new development should relate and connect with include the Maritime Museum, existing lodging, the marina, and the businesses of the Madison Avenue Corridor.

In addition, throughout the West Waterfront Area, existing developments and public infrastructure should be better brought into the cohesive vision for the area. Private and public improvements such as signage, landscaping & streetscaping, and improved pedestrian connections can help enhance the area, building a well-connected area with strong relationship to the waterfront.

Detailed Site Recommendations

Detailed site recommendations are provided below for the four priority areas identified by the City.

Site 1: Co-op and Coast Guard Planned Development

This site includes the former Door County Co-Op, including a granary, and the U.S. Coast Guard operations. Recently, the U.S. Coast Guard completed a move directly across Oregon Street, which provided them with a consolidated and more secure new facility, while freeing up a larger redevelopment parcel adjacent to the Maritime Museum. This Plan looked at the site, including the former Guard and Co-op sites, as a larger combined redevelopment opportunity.

The primary new development opportunity identified for the site is tentatively named the Door County Four Seasons Market. The Market is envisioned as a...
20,000 square foot 2-story retail “showcase’ of the food and arts of Door County. With the rich agriculture and cultural traditional and economic assets in the community, the Market would act as a dedicated home for promoting these resources and making them highly accessible to the public, both residents and visitors.

The Market would be a “Trailhead to Door County Farms and Foods” and provide a hub of activity, retail, and resources related to the City’s and region’s local and specialty foods, poising local producers and processors to reach new customers and markets. With arts and music complementing food as key assets of Door County, the Market could provide a permanent home for the community’s existing farmer’s market, the Sturgeon Bay Farm & Craft Market. Regional music, crafts, and art, with a potential niche in industrial arts, could all be highlighted for viewing and sale within the facility.

The Market is envisioned as a public market-style building modeled after well-established and enduring indoor-outdoor markets in the U.S. and abroad. The first floor walls could be designed and built with the ability to open to the outdoors, creating and inviting atmosphere spilling activity onto the boardwalk and public spaces. The second story could include an outdoor patio offering views of the waterfront and of the Granary, reinforcing these traditional yet enduring key factors in the development and economy of Door County.

The facility is envisioned as a private development project, one developer taking on the project and providing options for multiple leased tenants. In addition to independent producers, existing businesses and retailers such as a local foods grocer could find a home or expand operations at the Market. Related dining, such as a 5,000-6,000 square foot brew pub or restaurant, could be part of the development.

The Market could also grow into a role of serving as a retail hub for regional foods, helping to retail products developed throughout the county.

With Sturgeon Bay’s position as a the largest City in Door County and County Seat and as the springboard for travelers to Door County, the Market would be ideally positioned to serve the
local community year-round while also being convenient to travelers to destinations throughout the peninsula. Well-integrated with surrounding development and pedestrian-friendly, the Market would also have designated on-site parking adjacent to the building to facilitate access for visitors. At its prominent waterfront location between the Michigan and Oregon Street bridges, the Market could feature nautical architecture and styling and compliment the Maritime Museum and the Marina on either side.

**Lodging** is another key component of the plan for this site. The site’s size and location call for a 50-60 room, 4-story development from a national lodging developer. The hotel could maximize the views available at the planned location through being sited perpendicular to the Bay, providing waterfront views from rooms which would ideally feature balconies. The site configuration would also maximize the visibility of the hotel from the Michigan and Oregon Street bridges and provide the opportunity for signage on the building. The hotel should include designated parking and a drop-off area for guests. Building architecture should relate to the working waterfront character and could relate to nautical themes or complement the adjacent granary.

As mentioned above, the **Granary** is a historic icon in this working waterfront area, reinforcing the Region’s agricultural assets—past and present—and helping tie the whole of this large redevelopment site to the working harbor. The building itself could find new use as a Waterfront area icon/beacon, with the opportunity for prominently advertising the Door County Four Seasons Market and the Maritime Museum. Supporting the character of this area as an inviting working waterfront district, the granary could feature a open-air, ground-floor interpretive display providing viewers with the history of the waterfront and community. The granary could also be used as a backdrop for the adjacent plaza and outdoor gathering and arts performance space.

To fulfill this role as a positive icon and marketing piece for the West Waterfront Area and its attractions, the exterior of the granary would need to be refinished with metal paneling, and repair work to the wooden support beams and other upgrades would need to be completed inside.

The far end of this waterfront site provides space for a small new commercial development along Maple Street. The **Maple Street Commercial** building could include about 7,000 square feet of new retail space complementing the uses and activity of the site. Retail uses should include those aligned with the waterfront such as an outfitter, bike rental, or fishing gear retailer. Other commercial uses which would be appropriate include those which serve waterfront area users, whether locals, tourists, or boaters, such as a national casual fast dining restaurant (e.g., Qdoba; Panera, Cosi). Any of these uses would help extend the waterfront district activity out to the Madison Avenue commercial district, enabling the development to serve users of both the waterfront and Madison Avenue and encouraging cross-traffic between...
the two through strong pedestrian connections. The scale of adjacent development calls for a two-story structure, providing the opportunity for office or residential space above. Architectural quality should complement that of the waterfront area.

To help facilitate access to this site, two sets of **Transient Docks** are planned to accommodate visiting boaters and encourage them to spend time in the West Waterfront Area. The docks could serve the many well-connected amenities of a cohesive West Waterfront. The Maritime Museum and restaurant docks, south of the Michigan Street Bridge, provide a connection from the water to the boardwalk which passes underneath the bridge. The pontoon boat rental facility in this area complements these users and draws more people out onto the water. The second set of docks serves more directly the Market and Madison Avenue and is located just north of the Oregon Street Bridge.

In order to facilitate new transient dock installation, all or parts of the existing tug boats operation in the area may need to be relocated.

**Site 2: Restaurant Reuse**

The former restaurant site is located directly north of the Michigan Street Bridge, adjacent to the public waterfront. The restaurant space is highly tied to the waterfront, sharing a building with the Marina and located directly across from the Maritime Museum.

The City should work with the property owner to actively seek a waterfront restaurant user. Several design and site enhancements could be considered to increase access and attract more diners. Improvements to consider include developing a new access point providing an accessible connection between the site and boardwalk; redesigning the entrance so the stairway is no longer split up and down; relocating and regarding the site’s vehicular access to align with the Maritime Museum entrance on Madison Avenue, and removing the covered drop-off area if needed for an entrance reconfiguration. Another opportunity which should be explored with the Marina operator is the opportunity to adjust boat slip usage to provide transient slips near to the restaurant for diners’ use. This would provide the restaurant a second “front door” inviting customers off the water into the restaurant and the entire West Waterfront Area.
The restaurant space could also potentially be divided into two different uses on either level. Both levels include an existing commercial kitchen.

**Site 3: Madison & Maple Residential**

The southeast corner of Madison Avenue and Maple Street includes an opportunity for adaptive reuse of an existing warehouse building as a mixed-use workforce housing and commercial building. The site also includes space for new residential multi-family development which would create a complementary alternative to the historic reuse units of the warehouse.

Adaptive reuse of the warehouse should maintain the ground floor building’s façade along facing Madison Avenue for commercial uses, ensuring the warehouse maintains the continuity of business uses along this commercial corridor. Additional warehouse space interior to the site could be used for covered parking for commercial and/or residential building users, and could be accessed from the street or the existing alley. Above, three stories could be added to house about 30 residential units (10 per floor) which could include a mix of studio, one- and two-bedroom apartments with balconies, many of which would offer a bay view. There is potential to align the apartments with the Door County Four Seasons Market, providing artist live/work lofts for those working of creating goods for sale at the Market.

**New residential construction** on the eastern portion of the site could include a freestanding building complementary to the warehouse with four stories and a similar footprint with space for 10 units per floor (for a total of about 40 units). Similar to the warehouse, the new development would feature studio, one- and two-bedroom apartments with balconies and bay views. Underground parking with alley access could be developed, providing surface parking space to accommodate visitors.

**Site 4: Larch Street Residential**

The Larch Street Residential site, directly across from Bridgeport Resort and just off Madison Avenue, provides unique...
opportunities for market-rate apartments with a potential affiliation or expansion space for Bridgeport Waterfront Resort. A free-standing residential structure could be developed in the center of the block, offering one- and two-bedroom units with underground parking and prime bay views. The preliminary concept illustrates two 3-story buildings, with approximately 48 units total. The west building with 10 units per floor (30 units total) and the east building with 6 units per floor (18 units total).

With the proximity to the Resort, a developer could also consider creating a partnership through which residents would have the opportunity to utilize the Resort spa and athletic facilities. Another potential consideration would be to eventually close Larch Street to accommodate expanded Resort and apartment parking.

The corner of Madison Avenue and Larch Street should remain in commercial use. This redevelopment site could feature a new mixed-use development with ground-floor retail leveraging the Madison Avenue frontage and new residential spaces above.

**Public Amenities and Design Features**

Redevelopment of the West Waterfront Area should build off of the existing boardwalk and waterfront pathways and increase connectivity between redevelopment sites and to the nearby Madison Avenue business district.

Public amenities should celebrate the working waterfront heritage, and provide opportunities for educational and artistic displays and artifacts, building off of the existing amenities at the Maritime Museum.
Implementation Strategy

The vision and recommendations in this Plan will require the City and WRA to use various coordinated implementation tools. Generally these tools fall within three inter-related implementation tracks—public actions, redevelopment facilitation, and infrastructure improvements. As described below:

- Public actions include regulatory tools such as rezoning, official maps, TIF District creation and amendments, statutory redevelopment plans, and special assessment districts.
- Redevelopment facilitation includes processes for private needs such as property assemblage, business relocation, marketing, developer recruitment, and grant opportunity identification, applications and administration.
- Infrastructure improvements include public needs such as roads, utilities, waterfront improvements, parking, signage, and streetscapes.

Recommendations:

1. **Establish a Project Management Team (PMT).** Redevelopment is a difficult process requiring the coordination of public and private resources. To effectively implement this Plan, the creation of a staff level PMT is recommended to advance area redevelopment.
2. **WRA Project Advancement.** To effectively implement this plan, the City via the WRA, should have an active role in potential site control, and administration of specific redevelopment activities including guiding the procurement of grant funding to facilitate implementation, and guidance on potential TID overlay district creation or amendment of existing plans.
3. **Catalytic Site Advancement.** Build off of this Plan and the developer outreach already underway to take the next steps in redevelopment for key sites. Immediate next steps for key sites, include:
   a. Aggressively “work” this Plan to recruit developers for the workforce housing, Market, and restaurant projects.
   b. Conduct architectural analysis to develop cost estimates to determine if the Granary icon reuse is structurally and financially feasible.
   c. Develop a Door County Four Seasons Market business plan (via grant funding) to prepare the concept for private sector development.
   d. Develop a strategy for environmental planning and site control of the Co-op site.
   e. Outreach to local and regional philanthropists who may have a particular interest in a regional food related project or waterfront initiative.
   f. Conduct due diligence related to tug boat relocation and determination of new location and facilitate relocation.
4. **Leverage Funding Opportunities (Grant and Tax Credit) for Project Implementation.**
   The City should seek grants to help finance projects and advance concepts that will become private redevelopment efforts.
   
   a. A short-term next step is to seek grant funding for the Waterfront Area (Wisconsin Coastal Management Program) and the Door County Four Seasons Market (HUD Sustainable Communities: Community Challenge Grant).
   
   b. Grant funding should be explored from WDNR, Wisconsin Economic Development Corp. and USEPA to advance Co-op site assessment, cleanup and reuse.
   
   c. Assist private developers in identifying tax credits to assist in project development including New Markets Tax Credits and WHEDA tax credit programs.

5. **Design Public Improvements.** Once implementation is underway, the City should begin public improvements planning and design – such as boardwalk, connectivity, public gathering spaces, and wayfinding improvements to further enhance the area.
Appendices

1. Market Assessment Summary
2. Existing Community Plans
3. Development Examples
Appendix 1: Market Assessment Summary

WisDOT Traffic Counts

Traffic counts in Sturgeon Bay near the project area, on both sides of the bay/river, are some of the highest in the City. Counts in the project area include:

- 9,800 on W. Maple St. just west of S. Neenah Ave;
- 6,700 on S. Neenah Ave just south of E. Oak St., and
- 4,900 on W. Maple St. just west of S. Lansing Ave.
- On Green Bay Road, heading north from Highway 42 toward the Michigan St bridge, traffic counts increase from 4,400 to 5,100 just south of W. Maple St.

Other high count areas include along Highway 42 and extending into town from Highway 42 on Egg Harbor Road. Traffic counts on Highway 42 in the western side of the City range from 10,500 – 14,000, which is higher than on Highway 42 in the eastern side of the City, where they range from 7,900 – 11,200. The highest traffic count recorded along Egg Harbor Road was 8,600.

Trade Area Delineation

A trade area is the area from which the majority of the customers of the total volume of businesses is generated. Identifying an Effective Trade Area (ETA) is a critical tool to understanding market potential at a site. An ETA is essentially a geographic area around a particular store or commercial district that captures the residences of the majority of the customer base. Understanding a site’s trade area is an important first step to understanding the market opportunities that exist on that site. The size and shape of an ETA is typically based on a number of factors including distance to the site, drive time distance to the site, geographic considerations, competing areas, and the relative attractiveness of the complementary commercial establishments around the site.

The Local Market Area defines an area within which the West Waterfront Area would be a first choice retail area for routine purchases and services available in small- to mid-sized cities. Specifically, customers within the Local Market Area would choose Sturgeon Bay over other retail areas in the region such as Green Bay.

The Local Market Area was determined to include all areas to the northeast of Sturgeon Bay, given that the City offers the most retail and service business options on the Door peninsula and that potential customers from communities further along the peninsula would have to travel through the Sturgeon Bay area (either going directly through the project area on the Michigan & Oregon St Bridges, or going around the project area by about .75 miles to the south on Highway 42/57). To the south, the Local Market Area is less clear given that potential customers from the regional area have several other similarly-sized or larger metro areas to choose between for goods and services. For day-to-day needs available in each of the various regional markets, it is likely that drive time would be the biggest factor determining where a particular consumer would bring their business. Drive times were reviewed between Sturgeon
Bay and Green Bay, the closest market to Sturgeon Bay, and the Local Market Area’s southern extent was drawn to reflect the point at which drive times were comparable to either community. For example, the small community of Algoma lies 28 minutes (20 miles) from Sturgeon Bay, compared to 42 minutes (32 miles) from Green Bay. It is assumed that for goods and services available in either market, Algoma area consumers would most often choose Sturgeon Bay to save time and gas. Similar review was done of other rural areas in northwestern Kewaunee County to determine the Local Market Area’s southern extent. The Local Market Area is shown in Figure 1. This map also shows 10- and 30-minute drive times to give an indication of travelling distance within the market area.

Local Market Area

![Map showing Local Market Area and drive times](source)

*Source: ESRI Business Analysis, May 2011*
Retail Gap Analysis: Existing Retail and Market Opportunities

Figure 2 highlights existing and potential retail spending within the West Waterfront Area’s Local Market. Overall, the area has a greater supply than demand in the major industry areas of Retail Trade and Food and Drink, meaning that the retail potential of the Local Market Area is more than met by current supply. However, this analysis does not take into account the retail, food and drink market opportunity brought to the area by visitors, which constitute a substantial part of the Local Market Area’s economy. Industry groups which benefit strongly from visitor dollars, from eating and drinking establishments, to gas stations, to sporting goods and hobby stores saw greater retail sales than would be demanded by the Local Market Area alone. The data reinforce the area’s role as a visitor destination, drawing spending dollars from outside the area.

According to ESRI estimates, total retail sales within the area delineated by the Local Market Area amount to about $303 million; based on the population and income within the Local Market Area, total retail demand from within the Local Market Area is about $285 million. Drawing even more spending from outside the Local Market Area are food & drinking establishments. In this group, total sales within the Local Market Area amount to about $64 million, while demand from the Local Market Area is only about $44 million.

There were a number of industry groups for which, in contrast to the area’s overall surplus, there was a retail leakage to areas outside the Local Market Area. In general, these industries are not well-suited to the West Waterfront Area. They included automobile dealers, furniture stores, electronics & appliance stores, building materials and supply stores, and clothing stores, among others.
Local Market Area Retail Spending and Gap Analysis

### Summary
**Local Market Area**
- Area: 1,666.52 square miles

**Demographics**
- 2010 Population: 33,459
- 2010 Households: 14,861
- 2010 Median Disposable Income: $26,050
- 2010 Per Capita Income: $25,001

### Industry Summary

#### Local Market Area Retail Spending and Gap Analysis

<table>
<thead>
<tr>
<th>Industry Category</th>
<th>Demand (Retail Potential)</th>
<th>Supply (Retail Sales)</th>
<th>Leverage/Gap Factor</th>
<th>Number of Businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Retail Trade and Food &amp; Drink (NAICS 44-45, 722)</td>
<td>$208,345,111</td>
<td>$202,447,777</td>
<td>$16,897,334</td>
<td>802</td>
</tr>
<tr>
<td>Total Retail Trade (NAICS 44-45)</td>
<td>$208,345,111</td>
<td>$202,447,777</td>
<td>$16,897,334</td>
<td>802</td>
</tr>
<tr>
<td>Total Food &amp; Drink (NAICS 722)</td>
<td>$44,307,899</td>
<td>$44,263,106</td>
<td>$16,897,334</td>
<td>101</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Industry Group</th>
<th>Demand (Retail Potential)</th>
<th>Supply (Retail Sales)</th>
<th>Leverage/Gap Factor</th>
<th>Number of Businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicle &amp; Parts Dealers (NAICS 444)</td>
<td>$59,786,866</td>
<td>$53,762,120</td>
<td>$16,909,747</td>
<td>12.2</td>
</tr>
<tr>
<td>Automobile Dealers (NAICS 441)</td>
<td>$56,976,354</td>
<td>$82,862,270</td>
<td>$25,885,916</td>
<td>38.1</td>
</tr>
<tr>
<td>Other Motor Vehicle Dealers (NAICS 441)</td>
<td>$7,907,016</td>
<td>$20,033,706</td>
<td>$12,126,690</td>
<td>44.0</td>
</tr>
<tr>
<td>Auto Parts, Accessories, and Tire Stores (NAICS 4413)</td>
<td>$573,462</td>
<td>$467,027</td>
<td>$106,435</td>
<td>14.9</td>
</tr>
<tr>
<td>Furniture &amp; Home Furnishings Stores (NAICS 442)</td>
<td>$7,362,166</td>
<td>$7,414,403</td>
<td>$37,237</td>
<td>2.0</td>
</tr>
<tr>
<td>Furniture Stores (NAICS 4421)</td>
<td>$5,073,860</td>
<td>$4,210,706</td>
<td>$863,154</td>
<td>9.9</td>
</tr>
<tr>
<td>Home Furnishings Stores (NAICS 4422)</td>
<td>$2,794,545</td>
<td>$3,103,704</td>
<td>$309,159</td>
<td>5.9</td>
</tr>
<tr>
<td>Electronics &amp; Appliance Stores (NAICS 4433)</td>
<td>$7,402,442</td>
<td>$8,609,196</td>
<td>$2,207,754</td>
<td>18.1</td>
</tr>
<tr>
<td>Building Materials, Garden Equip. &amp; Supply Stores (NAICS 444)</td>
<td>$10,139,551</td>
<td>$7,059,077</td>
<td>$3,074,974</td>
<td>17.9</td>
</tr>
<tr>
<td>Lawn and Garden Equipment and Supplies Stores (NAICS 4442)</td>
<td>$1,221,443</td>
<td>$1,074,989</td>
<td>$146,454</td>
<td>1.9</td>
</tr>
<tr>
<td>Food &amp; Beverage Stores (NAICS 445)</td>
<td>$38,345,452</td>
<td>$37,465,175</td>
<td>$17,730,590</td>
<td>18.5</td>
</tr>
<tr>
<td>Grocery Stores (NAICS 4451)</td>
<td>$32,201,132</td>
<td>$59,259,263</td>
<td>$27,058,131</td>
<td>17.8</td>
</tr>
<tr>
<td>Specialty Food Stores (NAICS 4452)</td>
<td>$5,167,330</td>
<td>$5,161,325</td>
<td>$144,005</td>
<td>1.4</td>
</tr>
<tr>
<td>Beer, Wine, and Liquor Stores (NAICS 4453)</td>
<td>$1,411,278</td>
<td>$1,612,080</td>
<td>$200,702</td>
<td>8.8</td>
</tr>
<tr>
<td>Health &amp; Personal Care Stores (NAICS 4454/4455)</td>
<td>$12,053,054</td>
<td>$11,933,476</td>
<td>$129,578</td>
<td>1.0</td>
</tr>
<tr>
<td>Gasoline Stations (NAICS 447/4471)</td>
<td>$52,935,012</td>
<td>$60,020,425</td>
<td>$5,085,413</td>
<td>18.5</td>
</tr>
<tr>
<td>Clothing and Clothing Accessories Stores (NAICS 446)</td>
<td>$10,099,237</td>
<td>$8,738,002</td>
<td>$1,361,235</td>
<td>6.8</td>
</tr>
<tr>
<td>Jewelry, Luggage, and Leather Goods Stores (NAICS 4463)</td>
<td>$1,097,372</td>
<td>$1,647,702</td>
<td>$494,330</td>
<td>1.5</td>
</tr>
<tr>
<td>Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)</td>
<td>$3,205,180</td>
<td>$8,002,608</td>
<td>$1,597,706</td>
<td>20.0</td>
</tr>
<tr>
<td>Furniture Stores (NAICS 4421)</td>
<td>$1,503,024</td>
<td>$1,224,622</td>
<td>$278,402</td>
<td>17.2</td>
</tr>
<tr>
<td>General Merchandise Stores (NAICS 452)</td>
<td>$8,717,780</td>
<td>$5,262,264</td>
<td>$3,455,016</td>
<td>11.0</td>
</tr>
<tr>
<td>Other General Merchandise Stores (NAICS 4520)</td>
<td>$8,717,780</td>
<td>$5,262,264</td>
<td>$3,455,016</td>
<td>11.0</td>
</tr>
<tr>
<td>Miscellaneous Store Retailers (NAICS 453)</td>
<td>$7,063,985</td>
<td>$11,104,205</td>
<td>$4,040,220</td>
<td>5.9</td>
</tr>
<tr>
<td>Office Supplies, Stationery, and Gift Stores (NAICS 453)</td>
<td>$3,867,832</td>
<td>$5,618,713</td>
<td>$2,750,881</td>
<td>29.5</td>
</tr>
<tr>
<td>Other Miscellaneous Store Retailers (NAICS 4535)</td>
<td>$4,008,637</td>
<td>$3,739,171</td>
<td>$2,269,566</td>
<td>5.5</td>
</tr>
<tr>
<td>Nonstore Retailers (NAICS 454)</td>
<td>$5,703,064</td>
<td>$3,769,171</td>
<td>$1,934,893</td>
<td>20.0</td>
</tr>
<tr>
<td>Electronic Shopping and Mail-Order Houses (NAICS 4541)</td>
<td>$1,126,900</td>
<td>$1,126,900</td>
<td>$0</td>
<td>100.0</td>
</tr>
<tr>
<td>Used Merchandise Stores (NAICS 4533)</td>
<td>$316,475</td>
<td>$60,186</td>
<td>$156,289</td>
<td>22.7</td>
</tr>
<tr>
<td>Miscellaneous Store Retail (NAICS 4539)</td>
<td>$3,616,737</td>
<td>$3,616,737</td>
<td>$0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

### Additional Analysis
- **Gap Analysis**
- **Leverage/Gap Factor**
- **Number of Businesses**

Vandewalle & Associates 24
Appendix 2: Existing Community Plans

During the Comprehensive Plan process, in March of 2008 a community-wide household survey was conducted. The Top 3 uses respondents would like to see Downtown included:

- Specialty stores (82%)
- Residential above retail (mixed use) (77%)
- Offices (77%)

Types of uses respondents would not like to see Downtown included fast-food restaurants; vehicle dealership; multi-family residential; two-family residential; health care facility; convenience store; single-family residential.

Generally speaking respondents were in favor of more development in Sturgeon Bay, including:

- Commercial development (74%);
- Industrial development (89%);
- Parks, open spaces, and natural areas (79%); and
- Residential development (59%)

Stakeholder interviews were also held during the Comprehensive Planning process, in April 2008. Interview respondents addressed several topics which could impact the West Waterfront Area:

Housing

- Affordability, new housing development, and senior housing were identified as issues.
- The lack of affordable housing within Sturgeon Bay was a key discussion. The need for more affordable housing also is connected to the need for more primary-income job opportunities. While affordable housing opportunities do exist (particularly in the form of older housing units), respondents indicated there is not enough variety and that it is difficult to make the transition from renter to first-time homeowner.
- Some stakeholders felt local affordable housing efforts should focus on rehab instead of new construction. For those buyers looking at market rate housing, many prefer single-family housing in new subdivision developments. However, these projects are more difficult to build with the increasing cost of infrastructure. Suggestions included partnerships between developers and the City to lower housing unit cost, as well as the inclusion of small parks or tot-lots into development projects.
- Sturgeon Bay has been and continues to be a retirement community, with long-time vacationers moving there permanently and seniors from northern Door County moving closer to services. As such, there is a desire for senior housing choices, including maintenance-free options. There was some question as to how Sturgeon Bay would adapt to meet demand for an increased level of health, transportation, and other services as the Baby-Boom population ages.
Industrial Development
Stakeholders indicated that a lack of available employees was a key industrial concern as employers try to replace baby-boom retirees. Stakeholders noted there have been some attempts to address this through business/education partnerships, but also that the situation is further impacted by the wage discrepancies between Sturgeon Bay and Green Bay.

Downtown & Waterfront
In addition to improving circulation and parking (creating two-way circulation; improving visibility and signage of parking; improving the pedestrian environment), the opportunities noted for Downtown were for the West Waterfront Area in particular – specifically the west end of the new bridge and the potential reuse or redevelopment of the former Door County Co-Op building/site.

Interviewees felt that Sturgeon Bay was behind other waterfront/port communities in several ways. They saw opportunities to highlight the presence of the Coast Guard with a permanent facility; improve the Downtown Park in connection with the new bridge crossing; develop a City Dock for tourist boats, cruises, ferries, etc. including a visitor’s center and wayfinding signage; and, in general, promote and support increased waterfront activities.

In terms of waterfront access, stakeholders thought that the boardwalk and waterfront improvements are good improvements but that they did not feel public. New and recent developments are blocking vistas to the water. Respondents felt Sturgeon Bay needs to be proactive in marketing its waterfront and selecting future development opportunities, including developing a more extensive boardwalk system. Stakeholders felt there was sufficient boat slip availability in existing marinas.

Finally, there was support for the working waterfront and its integration with the recreational and commercial aspects of the water. The working waterfront should be preserved and the City should protect the buffers and boundaries required for industrial uses.

West Side Waterfront enhancements were a priority area. Objectives for this area included:

- The City should work with Door County Maritime Museum to identify opportunities that compliment and extend their expansion plans. Adjacent properties provide an opportunity to develop a signature building that serves as a gateway to the Maple-Oregon Street Bridge, adds value to the west side, and has the potential to spur additional investment in the area.

- The Coast Guard activities along Sawyer Park should be emphasized as a tourist attraction and regarded as public open space to the extent possible (recognizing security and safety concerns).
Appendix 3: Development Examples

Throughout the plan process, relevant developments from different communities around the U.S. were reviewed. The following are a few of the examples referenced by WRA members and area stakeholders, and also researched by Vandewalle & Associates, which were considered in creation of the concept plan and vision perspective.

Ports O’Call Village, Berth 76, San Pedro, CA

Overlooking the bustling Port of Los Angeles, the largest working port in the nation, this authentic New England-style seaside village encompasses 15 acres of shops, restaurants and attractions. A meandering promenade of cobblestone streets connects the specialty shops and restaurants overlooking the harbor.

Cruises and sports fishing charters leave from this port and the area is home to many annual festivals, The Los Angeles Maritime Museum is a short walk from the village.

P.J. Asch Building, Stillwater, MN

The reuse of an historic granary in Stillwater, MN is an example of an adaptive reuse of a community icon. New uses in this building include an outfitter, sports oriented business which includes an indoor rock climbing wall.
San Francisco Ferry Building and Boardwalk, San Francisco, CA
The San Francisco Ferry Building and Boardwalk is a relevant example of a mixed use retail market that draws residents and visitors to the destination to meet daily needs or for dining and entertainment. Facets of this type of destination could play out in the Door County Four Seasons Market including specialty vendors, like the Artisan Cheese example shown below, as well as offer outdoor dining spilling out of the Market to the waterfront area.
Fell’s Point, Baltimore, MD

Fell’s Point was explored as a relevant example as it offers goods and services to area Baltimore residents all within walking distance, as indicated in the district map insert below, and in an iconic waterfront location. The bottom photo illustrates the addition of a modern structure to an historic structure and connectivity via a skywalk.
Quincy Market, Boston, MA and Historic City Market, Charleston, SC

The Quincy Market and Historic City Market provide examples of a gathering destination for market activities and inspire the Door County Four Seasons Market concept.
Traverse City Boardwalk, Traverse City, MI

The Boardman River winds through downtown Traverse City and connects with the riverwalk. The boardwalk-style walkway is a recreational trail as well as location for community festivals and activities.