



Downtown Neenah

MARKET ANALYSIS AND BRANDING STUDY

2013



arnett muldrow



INTRODUCTION

Future Neenah, Inc., in concert with the Neenah Central City Business Improvement District (BID), is spearheading economic development and marketing & branding initiatives for Neenah’s downtown business district. The goal of the Downtown Neenah Market Analysis and Branding Study project is to increase downtown engagement and spending by creating awareness with a cohesive brand and awareness platform.

This document summarizes key strategies for Downtown Neenah economic development, enhancement and branding initiatives based on an extensive review of background information and current market data; input provided via community and stakeholder surveys, focus groups and workshops; and direction and leadership provided by the local steering committee. Supplemental documents and deliverables referenced as part of this summary document include:

- ▶ Downtown Neenah Market Snapshot
- ▶ Downtown Neenah Area Consumer Survey Results
- ▶ Downtown Neenah Area Business Survey Results
- ▶ Downtown Neenah Branding System Package
- ▶ Downtown Neenah Branding Style Guide

Resulting strategies highlighted in this document provide a basis for enhancement initiatives and an exciting new branding system designed to tell Downtown Neenah’s story.

The timing for considering opportunities for business development, marketing and branding initiatives for Neenah’s traditional downtown area is opportune. The process is designed to build upon private and public sector investments, successes and momentum which are changing the landscape and complexion of Downtown Neenah.

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A Neenah Central City BID Project

NEENAH MEANS BUSINESS

Commercial Center

Neenah's early settlers built a strong local economy by harnessing the energy of the Fox River in the manufacture of lumber, flour, and paper products. Today the area is ranked as one of the 50 largest manufacturing centers in the nation, led by a diversified mix of businesses dealing in paper products, printing, computer technology, flexible packaging, cast metals, insurance, finance, and health care. The city's many assets, including progressive community leadership, the charming downtown district, exceptional workforce, and infrastructure network continue to attract new and expanding businesses.

Progressive Community Leadership

The City of Neenah's professional approach to attracting business has been recognized by Moody's Investors Service as a key factor in fueling local economic growth and building the area's financial strength. Strong collaborative efforts, through public/private partnerships, support such initiatives as economic development and community enrichment programs, as well as social, cultural, and recreational events for people of all ages.

Charming Downtown District

Neenah's nationally-recognized historic downtown offers a variety of shopping and dining choices, and serves as a venue for numerous community festivals and events. The downtown has also become a thriving commercial business district, including being the corporate headquarters for major corporations such as Plexus Corp., Bemis Co., Alta Resources, Inc., and having a major presence from Kimberly-Clark Corp. and Bergstrom Corp.

An Exceptional Workforce

Neenah's strong economy is supported by exceptional workers. Because over 90% of the area's workforce are at least high school graduates, local employers can count on intelligent, hard working employees. In fact, national companies consistently report that their Neenah operations are 20% to 30% more productive than at similar facilities around the country.

Supported by Infrastructure

Neenah's thriving economy is supported by a fully developed infrastructure network including connections to federal and state highways; two regional airports with nationwide jet service connections; rail service to major industrial areas and across the nation; intermodal facilities that make it easy to combine truck and rail transportation; and fiber optic installations that offer state-of-the-art telecommunications and high-speed internet service.



Neenah's nationally-recognized historic downtown offers a variety of shopping and dining choices, and serves as a venue for numerous community festivals and events.

– From the City of Neenah | Economic Development

THE DOWNTOWN NEENAH MARKETS

Traditional approaches to defining a trade area and market for a traditional downtown business district would fail to adequately capture and describe the market and opportunities for Neenah's Central City commercial district. The alternative approach applied as part of this study recognizes the divergent qualities of the captive Neenah Downtown Workplace market comprised primarily of district employees and nearby residents; and the evening, nighttime and weekend market that could be attracted from a more far-reaching geographic area.

Information compiled from demographic, psychographic and economic reports obtained from Nielsen Claritas and various other sources can be used to help profile these distinct markets and to analyze opportunities for Neenah Downtown. Nielsen Claritas is one of the nation's leading providers of geo-demographic commercial marketing and business information. Their data is considered among the most comprehensive, reliable, accurate and up-to-date available. Their expertise lies in the depth and quality of more than 60 integrated marketing databases composed of thousands of variables. Their numerous sources allow them to report, geographically, on a variety of demographic, consumer market and business development related variables.

Reports generated and data used to examine the Downtown Neenah Markets include:

Pop-Facts: Demographic Snapshot

Extensive demographic data profiles and tracks changes in the "live here" and "work here" populations within the Downtown Neenah Workplace and Drive Time study area geographies.

WorkPlace and Employment Summary

Reports provide insight into the lifestyle characteristics and traits of the "work here" market—and opportunities to better capitalize on the Downtown Neenah Workplace Market.

WorkPlace PRIZM Distribution

The report renders a portrait of the "work here" market's lifestyle traits and opportunities to increase market share.

PRIZM Household Distribution

Reports provide insights on consumer lifestyle traits and characteristics of household segments in the Downtown Neenah Drive Time markets—and how to better target them.

RMP Opportunity Gap – Retail Stores

One of the most important features of Nielsen Claritas Retail Market Power (RMP) reports is that they present a measure of consumer demand, expenditures and gaps (sales leakage or surplus) in the marketplace. Identified gaps may help to reveal opportunities for business growth and expansion.

A complete summary of ESRI reports and data is contained in the supplemental Market Snapshot document, available upon request.



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THE WORKPLACE MARKET

Demographic Profile

The profile assembled for the Downtown Neenah Workplace Market is based upon information contained in a series of Nielsen Claritas and Experian reports generated for a 0.5, 1.0 and 2.0 mile radius originating from the intersection of Wisconsin Avenue and Commercial Street.

Estimates and projections for demographic variables can lend insight useful for profiling the existing Downtown Neenah residential population and opportunities for the district’s commercial and housing markets.

The daytime population, estimated at 14,681 in a one-mile radius and 38,383 in a two-mile radius, illustrates positive daytime employment migration patterns and represents a sizable, captive market for the Downtown Neenah business community.

Like trends and projections for the Downtown Neenah five-minute drive time area, declining trends in population are shown for the Downtown Neenah Workplace Market’s radial geographies, though trends in the 0.5- and 2.0-mile radii are nominal at best. Conversely, households are expected to increase by about 1% to 2% through 2018 – a trend that is consistent with the Greying of America phenomenon and a shift toward smaller household sizes.

Given potential discrepancies in the limitations and timeliness of secondary data and more rapid change occurring in the Downtown Neenah area, it will be particularly important for Future Neenah, Inc. and Neenah Central City BID to continue to document changes in the housing market and to maintain internal housing data collection and tracking systems. The information might be used to present a “real time” profile that more accurately reflects the current housing climate.

The demographic snapshot for the Downtown Neenah residential market paints a picture of a diverse population dominated by one- and two-person households – especially in the half-mile radius where residents are also far more likely to rent. Income levels, particularly in the 0.5- and 1.0-mile radii, are low in comparison to household estimates for the region, but are likely indicative of a population having larger concentrations of single-income households and households with retired persons.



Downtown Neenah Workplace Market

Fast Facts

Workplace	0.5 M	1.0 M	2.0 M
2013 Daytime Population	4,030	14,681	38,383
2013 Employees	4,336	9,216	18,627
2013 Establishments	208	427	1,064
“Live Here” Population			
2010 Census	2,342	8,991	27,697
2013 Estimate	2,337	8,905	27,630
2018 Projection	2,334	8,790	27,571
Change 2013—2018	0.0%	-1.3%	-0.2%
2013 Estimated Income			
Average Household	\$47,067	\$51,670	\$57,714
Median Household	\$36,646	\$40,879	\$43,998
2013 Housing Tenure			
Owner Occupied	53.6%	70.4%	67.4%
Renter Occupied	46.4%	29.6%	32.6%

Sources: Nielsen Claritas; and DemographicsNow/Experian

THE WORKPLACE MARKET

Workplace Insights

The Nielsen Claritas Workplace PRIZM database and reports enables users to create a complete portrait of the “work here” market. Workplace PRIZM tracks the residential population of every census tract into its associated tracts of employment, covering private sector workers, public sector workers, 9-to-5 workers, swing shift and night shift workers—even those who work at home. The Workplace PRIZM composition is estimated using tract-to-tract commuting data produced by the U.S. Census Bureau.

Analysis of PRIZM social groups represented in the Workplace Market reveals high concentrations of:

- ▶ Middle to middle-upper income workers with median household incomes concentrated within a range of about \$46,000 to \$55,000.
- ▶ Workers employed in the Manufacturing (39%), Health Services (21%), Retail Trade (10%), and Business Services (7%) industries.
- ▶ Members with lifestyles which are home centered, and heavy on leisure and recreation.

Additional insights on the captive employee market can be gained from online consumer survey results for the participant group indicating it works in, or within two miles, of Downtown Neenah. Survey results for the downtown employees sample show:

- ▶ A relatively large number of participants travel more than 10 miles to work in the Downtown Neenah area (28% of the survey’s downtown employee sample), reinforcing the notion of a “captive market.”
- ▶ A 69% female to 31% male survey completion ratio, which could lend additional support for marketing messages and business development strategies which target females, in general, and the downtown female workplace population, specifically.
- ▶ Workers concentrated in the 35 to 64 years age group—representing 75% of the downtown employee survey sample—and with household incomes clearly concentrated in a range of \$50,000 to \$150,000, with 70% of all downtown employee group participants reporting in that range.

The consumer survey’s employee sample lends support for marketing messages and strategies which are more “sophisticated” in nature, and which are designed to more fully promote the district’s “refined” and distinguishing qualities, products, services, personalities, attractions, events and venues.

Out to Lunch

Twenty-seven percent (27%) of downtown area employees indicated they visit the Downtown Neenah area for dining and/or entertainment one or two times a week, as compared to just 15% of participants not employed in the downtown area.

Source: 2013 Downtown Neenah Area Consumer Survey

Expansion Opportunities?

Products frequently purchased online by downtown area employees could offer business expansion opportunities.

Products purchased on the Internet by downtown area employees within the last three months:

Women’s Clothing	48.1%
Books	46.4%
Gifts	45.9%
Men’s Clothing	26.5%
Sporting Goods	24.9%
Children’s Clothing	22.1%
Hobby, Sewing & Needlework Supplies	19.3%
Home Furnishings	18.2%
Specialty Foods	17.1%
Beauty Supplies	16.0%

Source: 2013 Downtown Neenah Area Consumer Survey

THE DRIVE TIME MARKET

Demographic Profile

Nielsen Claritas demographic reports generated for the Downtown Neenah 5, 10 and 20-minute Drive Time Markets provide extensive data to profile, benchmark and track the market. Analysis and comparison of data for the three drive time areas reveal:

- ▶ Trends and projections for the population and households within the drive time areas, with the exception of the population in the five minute drive time area, anticipate slow and steady growth through 2018. The projected 0.3% decrease in population for the five minute drive time area from 2013 to 2018 is marginal and appears to be offset by an anticipated 1.0% increase in area households through 2018.
- ▶ The composition of the five-minute drive time population, as compared to that in the 10 and 20-minute drive time areas, is slightly less ethnically and racially diverse. The White Alone race represents more than 90% of the population by race in all drive time areas.
- ▶ Comparatively lower 2013 income estimates are found for households in the five minute drive time area where Average and Median Household Income is about 8% to 12% less than figures reported for the ten and twenty minute drive time areas.
- ▶ More than 75% of the drive time areas' workforce age 16 years or older is employed in the For-Profit Private sector. More than 25% of workforce employees are employed in the Production and Office/Administrative Support occupations, cumulatively.
- ▶ More than 43% of the drive time areas' workforce members have a commute of less than 15 minutes, and about 40%+ have a commute time of 15 to 29 minutes.
- ▶ Approximately two-thirds of all occupied housing units in the drive time geographies are owner-occupied.
- ▶ Estimated median values of owner-occupied housing units in 2013 range from \$124,263 in the five minute drive time area, to \$137,545 in the ten minute area, to \$146,030 in the twenty minute area.



Downtown Neenah Drive Time Market

Fast Facts

Population	5 Min	10 Min	20 Min
2013 Estimate	23,809	67,271	285,492
2018 Projection	23,738	68,497	291,922
Change 2013—2018	-0.3%	+1.8%	+2.3%
Age	5 Min	10 Min	20 Min
2013 Est. Median Age	37.8	38.4	36.9
2013 Est. Average Age	38.5	38.7	37.9
Households	5 Min	10 Min	20 Min
2013 Estimate	10,323	28,586	114,887
2018 Estimate	10,430	29,330	118,157
Change 2013—2018	+1.0%	+2.6%	+2.8%
2013 Est. Income	5 Min	10 Min	20 Min
Average Household	\$56,837	\$61,227	\$61,111
Median Household	\$43,391	\$47,755	\$48,655

Source: Nielsen Claritas

RETAIL MARKET POWER

Retail Power

Nielsen Claritas RMP Opportunity Gap reports show supply and demand dollar estimates and the sales opportunity gaps (leakage or surplus) by retail category for a specific market. Estimates of demand (consumer expenditures) are based upon demographic characteristics of the residential market within the defined geography. Estimates of supply (retail sales) are based upon actual sales, and compared to demand to calculate the Opportunity Gap (Sales Leakage or Surplus) for each retail category. When the demand is greater than the supply, sales leakage is occurring; and when demand is less than supply, there is a sales surplus for that retail category.

Overall retail performance in the five-minute drive time area, largely driven by the Workplace Market, appears to show potential for expansion. Total retail sales for the five-minute drive time area, including sales for eating & drinking places, are estimated to total more than \$390 million, trailing demand, estimated at about \$425 million, to result in estimated retail leakage of nearly \$35 million.

Categories showing a retail surplus could be an indication of retail category strength in the marketplace. As a first step, examination of potential retail expansion and development strategies for downtown Neenah should consider potential – and appropriate – opportunities to capitalize on these strengths, particularly where appropriate and conducive to the existing and evolving business mix. Notably, the Foodservice and Drinking Places category shows an estimated surplus of more than \$2.1 million in the five minute drive time area. Other categories showing strength in the five minute drive time include:

- ▶ Hardware Stores
- ▶ Health and Personal Care Stores
- ▶ Jewelry Stores
- ▶ Musical Instrument and Supplies Stores
- ▶ Used Merchandise Stores

A number of retail categories and subcategories showing an Opportunity Gap (retail sales leakage) within the five-minute drive time area could, on the surface – and depending upon conditions, extenuating circumstances, surrounding competition and consideration of other market forces and factors that could be driving the results – serve as possible targets for downtown Neenah expansion and recruitment efforts. Examples of retail categories and subcategories showing relatively large amounts of sales leakage in the Downtown Neenah five minute drive time include:

- ▶ Food and Beverage Stores
- ▶ Full-Service Restaurants
- ▶ Family Clothing Stores
- ▶ Furniture and Home Furnishings Stores
- ▶ Electronics and Appliance Stores
- ▶ Other Miscellaneous Store Retailers
- ▶ Gift, Novelty and Souvenir Stores

Retail Sales

Workplace Market (\$MM)

0.5 Miles	1.0 Miles	2.0 Miles
\$40.0	\$121.6	\$398.9

Drive Time Market (\$MM)

5 Min	10 Min	20 Min
\$390.3	\$897.6	\$4,591.0

Source: Nielsen Claritas

Totals shown for all Retail categories (NAICS 441–454) and Foodservice and Drinking Places (NAICS 722)

Categories and subcategories showing a sales surplus—an indication of retail sector strength—in the Downtown Neenah five minute drive time include:

- ▶ Other General Merchandise
- ▶ Hardware Stores
- ▶ Limited-Service Eating Places
- ▶ Health and Personal Care Stores
- ▶ Jewelry Stores
- ▶ Musical Instruments and Supplies
- ▶ Used Merchandise Stores
- ▶ Drinking Places—Alcoholic Beverages
- ▶ Office Supplies and Stationery
- ▶ Florists
- ▶ Other Clothing Stores
- ▶ Women's Clothing Stores

MARKET INSIGHTS

The process behind the completion of this study and the resulting products and strategies considers findings from current market data and stakeholder input provided via:

- ▶ A business survey completed by 71 Downtown Neenah area businesses
- ▶ A consumer survey completed by 431 respondents
- ▶ An open invitation community workshop
- ▶ A series of focus groups with representatives from key Neenah area stakeholder groups

Following are examples of key findings which provide a sound basis for the new Neenah Downtown branding system and proposed implementation strategies outlined in this document.

The Neenah Downtown Markets

The Downtown Workplace Market, with a daytime population estimated at more than 14,000 persons within a one mile radius, is a sizable, captive market for downtown area businesses. Analysis of data and consumer survey results suggest a relatively large number of downtown area employees are commuting from more than ten miles—and even from beyond the twenty-minute drive time.

During the day, while out of their place of work, these employees may behave and have needs akin to an away-from-home visitor. Marketing strategies and customer service practices might emphasize a convenience and hospitality-oriented service approach to best capture and nurture this clientele.

Traffic Generators and Visit Frequency

Visits to the library, city hall, post office and other errands-oriented purposes generate frequent and consistent traffic in the downtown area, with more than 59% of all consumer survey respondents indicating they visit the downtown daily or weekly for those purposes. The downtown area’s evolving identity as a places for eating & drinking is also evident in consumer survey responses.

Illustrating the impacts of workplace employees, nearly 30% of downtown employees indicated they visit the area for dining (eating and/or drinking) at least once or twice each week, as compared to just 16% of the sample not employed in the downtown area.

Marketing and promotion strategies designed to increase visit frequency across the various business sectors should serve to heighten awareness for the full range of products and services available, while cross-marketing and promotion strategies should consider opportunities to intercept visitors, and for the delivery or placement of messages and collateral, at the workplace, at street level, and at both retail and non-retail traffic-generating attractions.



Question	
How far is your residence located from Downtown Neenah?	
Employee Sample Responses	Percent
In downtown or within 2 miles	29.5%
2 to 5 miles	27.1%
5 to 10 miles	15.7%
More than 10 miles	27.6%
Source: 2013 Downtown Neenah Area Survey	

Question	
How often do you visit the Downtown Neenah area...	
Frequency—Daily or Weekly	Percent
To do errands	59.5%
For service-related purposes	11.6%
For dining	22.5%
For entertainment	4.9%
To shop	6.8%
Source: 2013 Downtown Neenah Area Survey	

MARKET INSIGHTS

Virtual Reality

The ranking of media preferences by consumer survey participants demonstrates the growing influence of the Internet and social media applications as a news resource, for researching products and services, and for communicating with clients.

The Internet can be a particularly valuable resource for businesses because it provides the potential for businesses to expand their trade area well beyond local or regional geographies. Businesses with collectible, specialty, and custom merchandise lines, in particular, can use the Internet to market to the entire United States or even globally. Even traditional retailers and business carrying “staple” products are reaping benefits as, more and more, consumers use the Internet to “shop and compare” products and services, and then use the Internet – in much the same way previous generations of consumers used the Yellow Pages – as a resource to find a local outlet or vendor where they can make their purchase.

Downtown Neenah’s promotion and collaborative marketing efforts should consider how the Internet and various E-commerce, online directories and social media applications might be most effectively used to communicate with consumers and to further downtown promotional goals. The growing popularity of Facebook, Twitter and other social media applications as an effective source to communicate with clients is evident in consumer survey results that show more than 28% of all respondents selected Internet Websites and Social Media as one of their top two sources for news and information.

The new branding system must be adapted and consistently applied across a variety of medium—including Internet-based sites and applications—to enhance awareness and to create business connections to the Neenah Downtown brand. Businesses should be encouraged to “plug in” to Neenah Downtown and/or Future Neenah websites and social media sites which serve as portals, and to apply branding elements and extensions in their own electronic and print media applications to reinforce connections with the brand—and build brand equity.

A Neenah Downtown Facebook page, for example, might be designed to serve as a portal site, of sorts, to feature and easily share postings highlighting new and unique products, local personalities, special offers, events and other features which reinforce the new brand. Facebook advertising applications might be employed to help build traffic, particularly during the new page’s launch, and businesses should be encouraged to maintain fresh content and to share links and posts to leverage traffic generated at the Neenah Downtown portal page and the pages of other downtown area businesses.



Question

Of the following, which two (2) media and information sources do you most rely on for Neenah area news and information?

Top Consumer Survey Responses

Newspaper	50.2%
Internet Website(s)	28.7%
Social Media (Facebook, Twitter, etc.)	28.5%
Email Marketing	17.5%
Direct Mail (Valpak, Magazines, etc.)	15.3%

Source: 2013 Downtown Neenah Area Consumer Survey

Question

Have you purchased any products on the Internet within the last three months?

Consumer Survey Responses	Percent
Yes	88.2%
No	11.8%

Source: 2013 Downtown Neenah Area Survey

MARKET INSIGHTS

Leveraging Assets

Consumer survey participants gave Downtown Neenah high marks for a variety of identifiable—and marketable—qualities and traits which provide a solid foundation for images and messages to be reinforced as part of the new branding system.

Question

Compared to other places you frequently shop and do business, is Downtown Neenah stronger, equal or weaker in terms of...

Percentage of Consumers Rating Stronger or Equal

Cleanliness	96.4%
Attractiveness	93.4%
Customer Service	86.6%
Quality of Dining	83.7%
Quality of Products and Services	82.9%
Quality of Festivals and Events	80.8%

Source: 2013 Downtown Neenah Area Consumer Survey

The new branding system for Neenah Downtown uses images and messages which capitalize on these “known” qualities and assets to deliver a powerful statement and resonating impressions. Leveraging assets already identified as strengths in the marketplace provides opportunities to make natural connections with consumers, and enhances the ability for the new brand to readily gain traction through repeated and consistent applications and extensions.

A Work in Progress

Consumer and business survey participants place a high priority on business expansion and recruitment efforts—including proposals for creating incentives for new and expanding businesses in the downtown area; and efforts to restore and preserve the Downtown Neenah area’s historic character. Other possible enhancement efforts, such as improvements to the downtown area’s streetscape, public spaces and amenities, and efforts to increase communications, were also popular with survey participants.

Survey participants’ ranking of priorities provide direction for new and ongoing downtown enhancement initiatives. So, too, they provide a basis for images and messages, via the new branding system, which highlight distinguishing features and communicate positive change that is consistent with the community’s values and its desire for Downtown Neenah.



Question

Would you place a high, moderate or low priority on possible Downtown Neenah area enhancement efforts to...

Consumers Rating as a “High Priority”

Create incentives for new and expanding Downtown Neenah area businesses	53.4%
Restore and preserve the downtown Neenah area’s historic character	51.8%
Improve the downtown area’s streets, sidewalks, lighting, furnishings, green spaces, trails, etc.	41.1%
Increase communications efforts to promote events, highlight projects, publicize new businesses, provide construction updates, etc.	40.9%

Source: 2013 Downtown Neenah Area Surveys

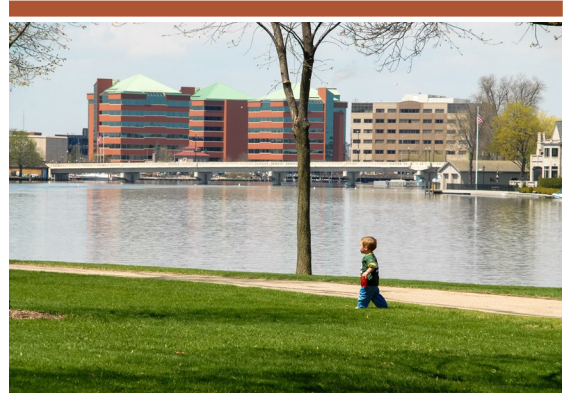
THE NEENAH DOWNTOWN BRAND

The branding system developed for Neenah Downtown provides direction and tools for a comprehensive and highly sophisticated marketing and branding strategy that can be readily adapted to public relations efforts, advertising, events, business retention and recruitment strategies, design enhancements and other initiatives contained within the Neenah Central City BID Operating Plan's complete scope of work.

What is a brand? A brand is a promise that is made to the consumer. It is the setting of an expectation and the meeting of that expectation, thus creating a dynamic relationship where trust is created. Over time, that trust is converted into equity. Brand equity is the asset that helps to attract developers, motivate new residents, attract new shoppers, and enhance overall quality of life. The development of a brand is the overall goal of most marketing efforts.

Branding system concepts and products developed as part of a complete branding system for Neenah Downtown are designed to:

- ▶ Build identity and appeal among targeted consumer market segments, including Neenah Downtown Workplace Market members
- ▶ Promote and build upon the district's "unequaled" qualities and experiences
- ▶ Capitalize on existing events and inspire ideas for new promotional events and activities
- ▶ Build excitement and promote the downtown area as a unique and distinct Fox River Valley attraction
- ▶ Be adaptable to a variety of media and communications formats and tools
- ▶ Promote a sense of exploration and discovery
- ▶ Provide ideas and direction for collateral materials, streetscape elements, and a host of other products that can effectively serve to extend the brand and reinforce a strong position for Neenah Downtown



THE NEENAH DOWNTOWN BRAND

Brand Statement

We are Neenah, Wisconsin.

Born on the banks where the Winnebago flows into mighty Fox, we were named for running water. And that water has long since been our heart and our soul. It has fueled paper mills and steel industry, and it has fueled an unequaled culture that is truly built on water.

Our environment has been the inspiration for education & innovation. We invest in our future, and believe in our own. Our family ties run deep, and we are still a place where caring for each other comes naturally.

From the global brand Kimberly Clark to Neenah Foundry whose designs grace historic downtowns across the world, the name Neenah has earned an unequaled reputation. Our dynamic blend of business acumen and amazing quality of life have combined to create an environment rich with leadership, innovation and determination.

And here in downtown, we are the heart of this dynamic place. We are the unique shops, the proud business owners, the fine flavors, and the family friendly events that truly make Neenah a community. From our historic architecture alongside contemporary flair to the public art gracing our streets, a day downtown is a day to be remembered.

We are Neenah Downtown, and this is our home. We are proud to invite you to discover our hospitality, sample our personality, and find a downtown that feels the way downtowns should. Be our guest, and we'll help you discover why we say that Neenah Downtown is truly Unequaled.



THE NEENAH DOWNTOWN BRAND

Logo Variations

Shown are examples of logo variations for the Neenah, Wisconsin brand. They have been created in two color, one color, reversed and black & white usages. All logos are created in vector art and are infinitely scalable and available for any use.



Brand Extension

Brand extension is the process of incorporating the brand into events and activities. By adopting the look, feel and tone of the Neenah Downtown brand, these events begin to be connected in the consumers mind and begin to add strength to the primary brand and vice versa.



THE NEENAH DOWNTOWN BRAND

Advertising...

Marketing and promoting the place.

N=

STRAWBERRY PLUS CHOCOLATE PLUS VANILLA= GOTTA GET SUM.

Beatum nus eate pore nis abo. Itae plit pro ius, apel ipsam iniscium im qui conmia niatum fuga. Itatint, sus. Aquas que voluptat omniendae suntia nate num adigendi qui consequo quam res quis mo endam ea sunt veliqui simus rerchit vero omnihillitio quae core apis desciet eumet ulpa quo bla sae dus dolupid mos accat que molendis acescis

Neenah
- DOWNTOWN -

FOR MORE INFORMATION, PLEASE GO TO OUR WEBSITE AT WWW.NEENAHDOWNTOWN.COM OR VISIT US ON FACEBOOK.

Forged. **Neenah** - DOWNTOWN - Unequaled.

History. **Neenah** - DOWNTOWN - Unequaled.

Spirit. **Neenah** - DOWNTOWN - Unequaled.

ADD SOME COLOR TO YOUR DAY

Beatum nus eate pore nis abo. Itae plit pro ius, apel ipsam iniscium im qui conmia niatum fuga. Itatint, sus. Aquas que voluptat omniendae suntia nate num adigendi qui consequo quam res quis mo endam ea sunt veliqui simus rerchit vero omnihillitio quae core apis desciet eumet ulpa quo bla sae dus dolupid mos accat que molendis acescis

Neenah
- DOWNTOWN -

FOR MORE INFORMATION, PLEASE GO TO OUR WEBSITE AT WWW.NEENAHDOWNTOWN.COM OR VISIT US ON FACEBOOK.

Business Advertising

Design strategies allow for connections to be made while also allowing each Neenah Downtown business to reinforce its own identity.

Neenah
- DOWNTOWN -

Fresh. Unequaled.



Flavor. **Neenah** - DOWNTOWN - Unequaled.



Uncorked. **Neenah** - DOWNTOWN - Unequaled.

uncorked

UNCORKED
104 W. WISCONSIN AVENUE
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(920) 884-1235
MOBILE: 920-884-0887@UNCORKED.COM

BAR HOURS OF OPERATION
MON. - TUE. 4 - 10 PM
THURSDAY - SUNDAY
FRIDAY & SATURDAY 12 - MIDNIGHT
SHOWS, CATERING

THE NEENAH DOWNTOWN BRAND

Collateral

FORTUNE
500

3 of them call downtown home.



Signage Extensions

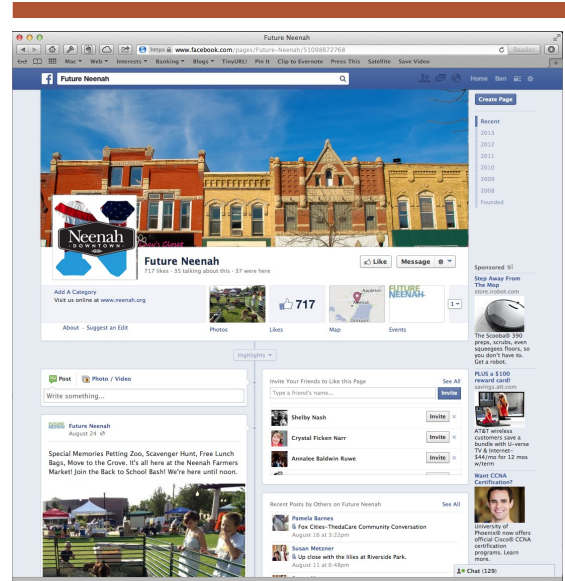


STRATEGIES

Marketing, Promotion and Public Relations Strategies

The new branding system created as part of this effort provides direction and practical tools for the enhancement, maintenance and introduction of marketing and public relations efforts.

- ▶ Assess options and devise and execute a plan for launching the new brand. Options include:
 - A grand launch and or launch event to unveil the new brand and, ideally, to initiate its application. For example, online teasers might be used leading up to the unveiling of a redesigned website, a novelty item featuring the new branding system’s graphics may be used as a gift to those attending a launch event, banners might be unrolled as part of an unveiling ceremony, or street banners might be installed during a launch event.
 - A rolling launch which gradually introduces the new branding system over time as products, collateral materials and events are reproduced or replenished.
 - A combination of the options described above.
- ▶ Redesign the Neenah.org website using an open-source platform (i.e., WordPress, Joomla, etc.) to enhance appearances, functionality and maintenance by Future Neenah, Inc. (FNI) staff and/or delegated personnel.
- ▶ Enhance the presence of Downtown Neenah and FNI in social media applications (i.e., Facebook, Twitter, Pinterest, YouTube, LinkedIn, etc.) and use social media to more closely and frequently connect with users and visitors.
- ▶ Apply the system of event graphics to promote Downtown Neenah area events and, simultaneously, reinforce a stronger sense of Downtown Neenah as a quality destination for fun activities and entertainment.
- ▶ Incorporate the branding system in FNI communications and collateral materials, and work to employ a variety of tools and medium in escalated efforts designed to promote events, highlight projects, publicize new businesses, provide construction updates, etc.
- ▶ Encourage and/or create incentives for businesses to incorporate the new branding system in their own marketing and advertising to extend the brand’s reach and depth. Examples include:
 - Creating a limited-time marketing grant program offering a rebate to businesses utilizing branding system graphics in marketing materials and advertisements.



Question

Of the following, which two (2) media and information sources do you most rely on for Neenah area news and information?

Top Responses

Newspaper	50.2%
Internet Website(s)	28.7%
Social Media (Facebook, Twitter, etc.)	28.5%
Email Marketing	17.5%
Direct Mail (Valpak, Magazines, etc.)	15.3%

Source: 2013 Downtown Neenah Area Consumer Survey

STRATEGIES

- Supplying branded gift tags to merchants during the holiday season or local product tags.
- Working to enhance links and connections with businesses’ Internet websites, Facebook pages, etc.
- Redesigning the Downtown Neenah map and directory—both print and online versions—to incorporate the branding system.
- Providing a store hours sign template, a “welcome/ sorry we missed you” sign, and/or a sandwich board sign for display by downtown businesses.
- Encouraging businesses to utilize branding system graphics in retail novelty items (t-shirts, coffee mugs, key chains, etc.).
- Using a customizable decal and/or storefront poster template incorporating the “N =” campaign theme to promote products, services, personalities, etc. found inside.

- ▶ Work to track branding usage investments made by downtown area business community members in terms of impressions, advertising dollars leveraged and product sales.
- ▶ Create an ongoing event (i.e., First Friday, Third Thursday, etc.) specifically targeted at Downtown Neenah Area employees. Work with area employers to promote the event and to offer incentives to attend.
- ▶ Work for prime placement of Neenah Downtown marketing and collateral materials at employee centers, foodservice establishments, the library, and other traffic generating facilities both within and outside the downtown area.
- ▶ Work with downtown area businesses to explore possibilities for the creation of a downtown employees loyalty rewards or perks program that promotes, and rewards, repeat visits to downtown area businesses.
- ▶ Use the new, proposed Neenah Downtown Facebook page to promote VIE (Very Important Employee) specials and limited time “flash” offers targeting the downtown employees market.
- ▶ Launch a Facebook Fridays campaign featuring a photo of one unique or rare item available at a different downtown area business each Friday—creating an ongoing scavenger hunt-type contest—and offering a Neenah Downtown branded t-shirt or other product as prizes for contest winners.
- ▶ Uniform event personnel and volunteers in branded apparel to help identify with the many faces of FNI and the Business Improvement District (BID).

Question

Does your business have an Internet website?

Responses

Yes	88.6%
No	11.4%

Source: 2013 Downtown Neenah Area Business Survey

Question

Does your business have a Facebook page?

Responses

Yes	75.7%
No	24.3%

Source: 2013 Downtown Neenah Area Business Survey

Question

Would you consider participating in a collaborative and common marketing campaign for Downtown Neenah?

Responses

Yes	49.3%
No	8.5%
Don't Know	42.3%

Source: 2013 Downtown Neenah Area Business Survey

STRATEGIES

Maintenance

The look and feel of the Downtown Neenah Area are critical components of the downtown experience. Buildings, public spaces and special features which are all part of the downtown environment will continue to impact the level of success experiences in all other work program areas, including efforts to entice customers and increase market share, to grow the downtown housing market, and to lure investors, new businesses and entrepreneurs.

- ▶ Consider and pursue opportunities to incorporate branding system graphics and elements in streetscape furnishings, seasonal and holiday banners and décor, wayfinding signage and markers, interpretive elements, etc.
- ▶ Uniform maintenance personnel in branded attire to demonstrate the value of FNI and the BID at work.
- ▶ Work to incorporate branding graphics and elements in plans for Navigate Neenah, where possible and appropriate.
- ▶ The City of Neenah will complete a parking study to assess and quantify, where possible, issues and concerns related to both the management and the supply of parking in the downtown area. Use information from the study and work with the BID to implement appropriate steps and improvements which will support efforts to best accommodate the needs of the downtown area’s various user groups.
- ▶ The City of Neenah will monitor parking system supply, management and utilization on an ongoing basis. Work with the BID in proactive fashion to implement necessary changes, and to anticipate and address future parking needs.
- ▶ Continue to work with the City of Neenah, property owners and business owners to promote, encourage and recognize efforts to enhance and maintain the district’s common areas, public spaces and special features.

Question

Would you place a high, moderate or low priority on possible Downtown Neenah area enhancement efforts to...

Restore and preserve the downtown Neenah area’s historic character?

Responses	Business Survey	Consumer Survey
High	49.3%	51.8%
Moderate	37.7%	35.0%
Low	7.2%	11.2%

Source: 2013 Downtown Neenah Area Surveys



When asked, “What is the first thing that should be done to improve the Downtown Neenah area?,” parking and transportation related topics and issues were cited with high frequency by both business survey and consumer survey respondents.

Source: 2013 Downtown Neenah Area Surveys

STRATEGIES

Business Recruitment and Retention

Current market information and input collected through local public participation activities orchestrated during the study process provide market insights and direction for continuing and new Downtown Neenah business retention, expansion and recruitment initiatives.

- ▶ Share information collected as part of this study process with Downtown Neenah area property owners and businesses to enhance awareness of conditions, trends, and potential opportunities for expansion. Distribute information in a summary format via the ambassador/retention call program.
- ▶ Continue to maintain a current list of properties and spaces available for sale and lease on the Neenah.org website, and in a downloadable or print-on-demand format. Distribute updates or notices to area brokers, realtors and prospects as changes occur, and work with owners, brokers and agents to encourage use of the Locate in Wisconsin online database and other commercial websites (i.e., Loopnet, CoStar, etc.).
- ▶ Collect and incorporate testimonials from property owners, investors, business persons and community stakeholders in business recruitment print and electronic collaterals.
- ▶ Using information compiled as part of this market study process as a benchmark, continue to collect, maintain and track information on real estate, market conditions and trends.
 - Update the Market Snapshot with Nielsen Claritas and DemographicsNow/Experian information about every one to two years to track changes in the marketplace.
 - Repeat the business survey on an annual or bi-annual basis to track Downtown Neenah area economic conditions and business trends and identify needs.
 - Use updates to refresh Downtown Neenah area recruitment collateral materials and online content.
- ▶ Devise fact sheets or similar collateral materials, incorporating the new branding system and which can be readily updated, to describe and promote available tools and incentives such as façade grants, sandwich board sign grants, retention and recruitment grants, etc.
- ▶ Work with economic development partners to promote and facilitate access to business assistance programs and resources (i.e., marketing consultations and workshops, business planning, business succession planning, business networking and B2B programs, Internet website and social media training sessions, etc.).



Expansion Ahead?

Which of the following best describes the potential for your business to expand within the next 1 or 2 years?

Business Survey Responses

High likelihood	23.9%
Some likelihood	39.4%
Low likelihood	22.5%
No likelihood	14.1%

Source: 2013 Downtown Neenah Area Business Survey

Change in the Making

In the next year or two, do you plan to change or modify your business in any of the following ways?

Top Business Survey Responses

Increase marketing	53.2%
Expand services or product lines	45.2%
Expand your business	33.9%
Increase number of employees	33.9%
Start or complete building improvements	32.3%

Source: 2013 Downtown Neenah Area Business Survey

STRATEGIES

- ▶ Augment market study information and findings to develop profiles for business types and models targeted for expansion and recruitment in the Downtown Neenah area. Identify and pursue specific candidates via field trips, publicity, etc.

Business types and merchandise lines that might be considered primary targets and candidates for expansion and recruitment, based on the downtown area’s existing business mix, trends in the marketplace and related findings from local input, consumer and business surveys, Nielsen Claritas retail data, and the accompanying sales surplus & leakage analysis performed as part of this study include:

Foodservices & Drinking Places (NAICS 722)

Subcategories:

- 7221 Full-Service Restaurants
- 7222 Limited-Service Eating Places
- 7224 Drinking Places (Alcoholic Beverages)

Notes: Neenah Downtown is, more and more, building a reputation—and displays destination-oriented qualities, characteristics and features—as a destination for eating and drinking. Full-service restaurant concepts, highly sought by survey and focus group participants—would be compatible and complementary to existing category entries and might include additional ethnic specialties. Opportunities and concepts for limited-service eating establishments will likely target the downtown employees population and could feature order-ahead, pick-up, delivery, catering and take-out services and specialties. Evening and nighttime establishments might feature various genres of music and venues for local artists to enhance the “fun & entertainment factor” sought by young professionals, singles and couples without kids. Décor and themes might feature local art, history and heritage.

Food & Beverage Stores (NAICS 445)

Subcategories:

- 4452 Specialty Food Stores
- 4453 Beer, Wine and Liquor Stores

Notes: Survey and focus group results show demand in the Food & Beverage Stores category and subcategories. The best and most immediate opportunities may revolve around the continued expansion of an evolving specialty foods cluster that capitalizes on the “foodies” trend, natural and organic foods specialties, deli meats & cheese specialties, and locally produced foods and “treats.” Other concepts could include a smaller-scale market carrying limited lines of staple grocery items and prepared foods, and emphasizing select lines of specialty foods (i.e., craft beverages and wines, organic and natural foods, etc.) with convenience-oriented appeal for both the local downtown employees and neighborhood residential markets, and local specialties for downtown area visitors. Seating areas, display production kitchens, and confectionery-oriented themes should be encouraged to build on the fun, entertaining and gathering place qualities of the district. Complementary retail lines might incorporate kitchen gadgets, home brewing and wine-making supplies, and home gardening (indoor and outdoor) supplies and gadgets.



Opportunities?

Please list one or two specific types of businesses that might make you visit [the Downtown Neenah area] more often.

Top Responses—Categorized

Restaurants	29.7%
Drinking Places—Alcoholic Beverages	12.3%
Specialty Foods	12.3%
Grocery Stores	10.4%
Limited Service Eating Places	9.4%
Festivals and Events	7.1%
Book Stores	6.6%
Gifts, Novelties and Souvenirs	6.1%
Theater/Theatre	6.1%
Hobbies, Toys and Games	5.7%

Source: 2013 Downtown Neenah Area Consumer Survey

STRATEGIES

Miscellaneous Store Retailers (NAICS 453)

Subcategories:

- 45322 Gift, Novelty and Souvenir Stores
- 4533 Used Merchandise Stores
- 4539 Other Miscellaneous Store Retailers

Notes: Sales surplus & leakage analysis and consumer survey results lend support for certain subcategories, and generalized responses indicating a preference for general retail and/or unspecified “boutique” and “specialty” shops, suggest this category should be targeted for expansion and recruitment. Well merchandised resale boutique concepts featuring quality home furnishings; used and rare books (possibly in tandem with a limited-service eating concept and book exchange); and lightly worn clothing resale and consignment boutiques specializing in lines such as maternity wear, children’s wear, t-shirts, vintage clothing, etc., might offer an opportunity to take advantage of “green” re-wearing/recycling trends and also help, via more well-defined niches, to fill demand in the Home Furnishings, Books and Clothing & Clothing Accessories categories. Gift, novelty and souvenir lines might include basic lines catering to the convenience-oriented gift shopping needs of the downtown workplace market; and also incorporate handcrafted products and art, select home furnishings, Neenah-branded products and apparel, and educational toys and games.

FORTUNE 500

3 of them call downtown home.



Question

Would you place a high, moderate or low priority on possible Downtown Neenah area enhancement efforts to...

Create incentives for new and expanding Downtown Neenah area businesses?

Responses	Business Survey	Consumer Survey
High	40.6%	53.4%
Moderate	40.6%	34.8%
Low	14.5%	7.1%

Source: 2013 Downtown Neenah Area Surveys

STRATEGIES

Development

Survey results and community input collected throughout the course of the study process lend direction, and demonstrate potential, for continued investment, development and redevelopment activities in the Downtown Neenah area.

- ▶ Continue to work in partnership with the City of Neenah, the Community Development Authority and other economic development partners to assess land use plans and to promote and pursue appropriate redevelopment opportunities; consider opportunities for, and the appropriateness of, higher-density mixed-use development and other housing styles as a means of growing the area’s residential market and population.
- ▶ Use information from the market study to promote mixed-use and housing opportunities in the Downtown Neenah area, and to profile the potential residential market for the downtown area. For example, the demographic profile for consumer survey respondents who answered “yes” or “maybe” to the question, “Would you consider living in Downtown Neenah?” reveals the following characteristics:
 - **Gender**
Female 70.8%
 - **Age**
55 to 64 25.0%
35 to 44 20.8%
25 to 34 20.1%
 - **Household Size**
Two Persons 41.0%
Four Persons 20.1%
Three Persons 19.4%
 - **Household Income**
\$100,000 to \$149,999 28.9%
\$50,000 to \$74,999 28.2%
\$75,000 to \$99,999 16.9%
- ▶ Work with residents, property owners and developers to organize an “Uptown Downtown” or similar housing tour event to showcase downtown residential units and to further gauge interest and potential demand for downtown area housing of various styles and price points.

Question

Would you consider living in Downtown Neenah?

Responses

Yes	16.8%
Maybe	19.5%
No	63.7%

Source: 2013 Downtown Neenah Area Consumer Survey

Question

Would you prefer to own or rent housing in the Downtown Neenah area?

Responses

Own	68.0%
Rent	32.0%

Source: 2013 Downtown Neenah Area Consumer Survey

Question

What kind of housing would you look for?

Responses

Apartment	25.8%
Loft	47.0%
Condo	53.0%
Townhouse	47.7%
Senior Housing	24.2%

Source: 2013 Downtown Neenah Area Consumer Survey

MOVING FORWARD

For Downtown Neenah and the Future Neenah, Inc. and BID organizations, the completion of this market analysis and branding study is not an end, but rather another milestone in the evolution of the community's nationally renowned downtown district.

This summary report serves to highlight only a small sample of the knowledge and direction that can be synthesized from analysis of data collected during the market analysis process. Similarly, implementation strategies and steps outlined in the document are only a starting point for a more comprehensive slate of projects that is likely to emerge as local leaders continue to study the market, and implement and "own" the exciting new brand for Downtown Neenah.

As the FNI and BID organizations move forward they must continue to involve local community leaders, business persons and residents in efforts to analyze and interpret the information collected through the market analysis process in order to develop a complete understanding of the findings and results – and the implications for the district. The ensuing process should seek to "dig deep" into the results and their meanings and to incorporate local knowledge into the analysis and interpretation of the study's findings. Such a process will serve to aid in the development and implementation of strategies that are both market-driven and intrinsic to the community's goals and aspirations for Downtown Neenah.

The market analysis and branding study process orchestrated to date may be, in and of itself, one of the most important "results" to emerge. While the process has served to help identify present-day priorities, existing and looming challenges, and immediate and emerging opportunities, it can not, and does not pretend to, anticipate tomorrow's priorities, next year's challenges, or exciting and unanticipated opportunities still over the horizon.

The diligent efforts undertaken by BID and Future Neenah, Inc. staff, steering committee members and other volunteers to help gather the input, to study the data, and to guide the development of market-driven strategies and the creation of a bold new brand for Downtown Neenah, have prepared the organizations and the community well by providing a public framework and a strong basis upon which the community can plan and act for the future. It is within this framework that the community will continue to marshal the resources and knowledge necessary to meet new challenges and to capitalize upon fresh opportunities.

