



Economic Development Advisory Board Regular Meeting

Agenda

June 13, 2023 @ 8:15 am

Winter Park City Hall Commission Chambers

welcome

Agendas and all backup material supporting each agenda item are accessible via the city's website at cityofwinterpark.org/bpm and include virtual meeting instructions.

assistance & appeals

Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office ([407-599-3277](tel:407-599-3277)) at least 48 hours in advance of the meeting.

"If a person decides to appeal any decision made by the Board with respect to any matter considered at this hearing, a record of the proceedings is needed to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F.S. 286.0105).

please note

Times are projected and subject to change.

-
- | | |
|---|------------|
| 1. Call to Order | |
| a. Select Chair and Vice Chair | 5 minutes |
| 2. Consent Agenda | |
| a. Approve the minutes of regular meeting May 9, 2023 | 1 minute |
| 3. Public Comments (for items not on the agenda): Three minutes allowed for each speaker | |
| 4. Action Items | |
| a. Approval of Retail Strategies Report | 40 minutes |
| 5. Non-Action Items | |
| 6. Staff Updates | |
| a. EDAB Commercial Performance Report | 5 minutes |
| b. Denning Wifi Project Update | 5 minutes |
| 7. Board Comments | |
| 8. Upcoming Agenda Items | |
| 9. Adjournment | |



Economic
Development
Advisory Board

agenda item

item type	Call to Order	meeting date	June 13, 2023
prepared by	Tatia Ghviniashvili	approved by	
board approval			
strategic objective			

subject

Select Chair and Vice Chair

motion / recommendation

background

alternatives / other considerations

fiscal impact



Economic
Development
Advisory Board

agenda item

item type	Consent Agenda	meeting date	June 13, 2023
prepared by	Tatia Ghviniashvili	approved by	
board approval			
strategic objective			

subject

Approve the minutes of regular meeting May 9, 2023

motion / recommendation

background

alternatives / other considerations

fiscal impact

ATTACHMENTS:

[Draft Minutes.pdf](#)



Economic Development Advisory Board Meeting Minutes

May 09, 2023 at 8:15 a.m.

City Hall, Commission Chambers
401 S. Park Avenue | Winter Park, Florida

Present

Sarah Grafton, Drew Madsen, Kevin Mcclanahan, Tracy Liffey, and Elijah J. Noel;
Virtually: Betsy Gardner Eckbert; Board Coordinator Tatia Ghviniashvili.

Absent

Ginny Enstad.

Staff Present

Assistant Division Director of Economic Development/CRA Kyle Dudgeon; Budget & Management Division Director Peter Moore; Economic Development/CRA Coordinator Anne Sallee.

1) Call to Order

Chair Sarah Grafton called the meeting to order at 8:17 a.m.

2) Consent Agenda

- a. Approve the minutes of regular meeting March 14, 2023.

Motion made by Kevin Mcclanahan to approve the minutes as presented; seconded by Drew Madsen. Motion carried unanimously with a 4-0 vote.

3) Public Comments (for items not on the agenda):

Mayor Phil Anderson, 1621 Roundelay Ln., gave brief comment on his support of the work this board is doing and is hopeful recommendations made will be considered by the City Commission.

4) Action Items

There were none.

5) Non-Action Items

- a. Retail Strategies Report - Phase II

Staff gave a few opening remarks regarding maximizing retail potential and ensuring there is a symbiotic relationship between businesses. In partnership with

consultants, the Retail Strategies Report was drafted and presented for initial feedback. A variety of trends, themes, and concepts were pulled together for the draft report, such as cross corridor traffic, critical mass, understanding behavior changes, etc., in order to seamlessly transition from theory to practice.

Elijah J. Noel arrived at 8:21 a.m.

Michael Berne, MJB Consulting, went through the report, and noted that the recommendations made are preliminary and curated to leverage Winter Park's retail potential in the form of action items. Found in the report is the implementation matrix which has four areas of focus: marketing, zoning, capital improvements, and incentives. The board asked questions to clarify the differences between permitted and conditional use as they relate to city code and retail.

Turning toward the implementation matrix in the agenda packet, Mr. Berne noted the importance of timing of the specific action items, such as those that can be completed in short, mid, and long-term windows. Also highlighted in the matrix are chief sponsors- those who would be primarily responsible for funding, as well as others that would be directly impacted- along with context and commentary which summarizes the reasoning and rationale behind this item.

Key themes and concepts were reviewed, which all relate to the discussions from Phase I.

- Co-tenancy and critical mass, especially when looking at the retail on Park Avenue and ensuring that the consumer continues to have a variety of options to choose from.
- Ecology of various districts was briefly mentioned, which is the interaction of districts, including competition and spillover. With this a notion was made of zoning and policies that might be grounded in different expectations for otherwise similar properties and stakeholders.
- Ground-floor tenancy, specifically the notion that space which exists along the frontage should be preserved for retail uses who have the greatest need for visibility.
- Understanding the roles of what uses are permitted and what rents are expected by landlords.
- Supply and demand working to determine the retail potential of structures with the same fiscal and design attributes.

Mr. Berne briefly spoke on place management entities, and explained their importance. He also highlighted a critical difference between main street organizations and business improvement districts/neighborhood improvement districts, which the later guarantees a funding mechanism that reduces the

dependence on city grants, private fundraising/revenue generating events, and also provides greater certainty for longer term initiatives.

The board made remarks about place management entities and asked clarifying questions about who provides funding for these entities. Mr. Berne explained that both the landlord and property owner are responsible for funding, in that, the assessment is on the property owner which is then passed down to the tenant. Further discussion ensued about C2 zoning in Winter Park and potentially ratifying it to accommodate the evolved industry. Staff noted that any modifications to the zoning code will have to be reviewed and approved by the Planning & Zoning Department, explaining why the time horizon for this item in the matrix is median term (3+ years).

The board asked further questions about activating the downtown in terms of businesses such as theaters, and playhouses, that would draw people in engage in an activity before or after dining/shopping. Mr. Berne addressed this and explained that it is important to ensure that the critical mass is not threatened by adding these types of businesses to Park Avenue. A discussion ensued and further clarifying questions were asked about C2 zoning for purposes of timing and inclusion in the Comprehensive Plan, and why this is projected for 3+ years. Staff made further clarifications.

Mr. Berne continued the presentation by highlighting that healthy districts and corridors tend to lean toward food and beverage. He also spoke on the modifications proposed for Orange Avenue Zoning- found in the matrix- most notably making certain uses that were previously permitted into conditional. He further spoke on zoning codes and the current process that prospective retailers have to navigate in order to secure necessary approvals and permits, and noted that zoning codes do not keep up with how quickly retail moves.

Staff and board made a few closing remarks and highlighted the general takeaways to be incorporated into the document and brought back at the next meeting.

6) Staff Updates

a. EDAB subcommittee

Staff gave a brief update on the latest EDAB Subcommittee meeting and the material that was discussed. Found in the agenda packet is a comprehensive list of definitions of economic development and types of things that the subcommittee valued as part of that. An abridged version will be brought back before this board at a future meeting.

b. EDAB Commercial Performance Report

Report was provided for board review, and no discussion took place.

c. 2023 Development Report

Report was provided for board review, and no discussion took place.

7) Board Comments

There were none.

8) Upcoming Agenda Items

Retail Strategies Phase II for board approval.

9) Adjournment

The meeting adjourned at 9:19 a.m.

Minutes approved by the board on _____.

/s/ Tatia Ghviniashvili, Board Coordinator



Economic Development Advisory Board

agenda item

item type	Action Items	meeting date	June 13, 2023
prepared by	Kyle Dudgeon	approved by	
board approval			
strategic objective			

subject

Approval of Retail Strategies Report

motion / recommendation

Approve as submitted

background

Over the past year, EDAB has worked with GAI and MJB consultants on a right-mix strategy for the city's commercial corridors in an attempt to gain clarity on how it's commercial markets can fully leverage their synergistic potential. At the May 2022 meeting, the consultant directed a cursory conversation with the board about potential recommendations. The idea was to get a general feel for each item prior to putting them in a deliverable. Since that time, the consultant has finalized this deliverable including specific actions, time horizon, chief sponsors, and context/commentary. Staff is requesting approval of the document with delivery to the City Commission at a future meeting.

alternatives / other considerations

Do not accept the report

Amend the report

fiscal impact

The study has been paid for within the budget. Supplemental requests for program recommendations will come to the board individually for cost considerations.

ATTACHMENTS:

[Winter Park Retail Strategies Report_June 2023_Final Draft v3.pdf](#)



CITY OF WINTER PARK RETAIL STRATEGIES

PHASE II IMPLEMENTATION MATRIX I
JUNE 2023

*Prepared by MJB Consulting and GAI Consultants, Inc.
Prepared for City of Winter Park, Florida*

CITY OF WINTER PARK

RETAIL

STRATEGIES

PHASE II IMPLEMENTATION MATRIX | JUNE 2023

ACKNOWLEDGMENTS

Kyle Dudgeon | Assistant Division Director, *Economic Development/CRA*
Peter Moore | Division Director, *Office of Management and Budget*

City of Winter Park
401 South Park Avenue
Winter Park, Florida 32789
(407) 599.3399

PROJECT TEAM

Michael Berne | President

MJB Consulting
85 Fourth Avenue, Suite 6A
New York, NY 10003
(917) 816.8367

Owen Beitsch, PhD, FAICP, CRE | Senior Advisor
Natalie Frazier, MBA | Project Manager

Community Solutions Group, GAI Consultants, Inc.
618 East South Street, Suite 700
Orlando, FL 32801
(321) 319.3088



© GAI Consultants, Inc. 2023
This document has been prepared by MJB Consulting and GAI Consultants, Inc. on behalf of the City of Winter Park, Florida.



PROJECT UNDERSTANDING

In March 2022, the City of Winter Park (“Client”) hired MJB Consulting, as a sub-consultant to GAI Consultants’ Community Solutions Group (“Project Team”), to undertake an extensive scope-of-work designed to arrive at and secure buy-in to retail strategies for Winter Park’s six main business districts and commercial corridors, listed below and illustrated on the map on the following page:

- Park Avenue and Side Streets
- Hannibal Square
- Fairbanks Avenue
- Orange Avenue
- 17/92 (“The Golden Mile”)
- Aloma Corners

Phase I in this scope-of-work analyzed retail conditions, opportunities and challenges, culminating in a memorandum that assessed whether Winter Park’s retail mix has been fully leveraging its synergistic potential and, if not, what market and real estate-related factors might be responsible.

As part of this exercise, the Project Team conducted interviews with the following¹:

- Teri Gagliano, Chez Vincent
- John Crossman, CrossMarc Services
- Damien Madsen, Harbert Realty Services
- Darryl Hoffman, JLL
- Sam Stark, Rollins College
- Dan Butts, Crossman & Company
- Tracy Brand-Liffey, New General
- David Gabbai, Colliers
- Matthew McKeever, Colliers
- Drew Hill, Hill Gray Seven
- David Albertson, Park Avenue landlord
- Brenda Carey, Great American Land Company
- Palmer Vietor, Owens Realty Capital
- James Petrakis, The Ravenous Pig/
Swine & Sons

In addition, the Project Team met with and presented to the members of the Economic Development Advisory Board (“EDAB”) on various occasions throughout 2022—July, September, and October—integrating the EDAB’s input and feedback into our ultimate findings and conclusions.

In Phase II, the Project Team has developed a host of recommendations that the City and various other stakeholders might consider in the name of more fully realizing such retail potential.

These recommendations are based on our extensive research and national experience as well as initial input and feedback from the EDAB (at a March 2023 meeting) and the City’s Planning Department.

¹The Project Team also reached out to a number of other stakeholders who did not respond.



Image Source: City of Winter Park

Note, however, that these recommendations are *preliminary*. There are many more stakeholders to interview for comments and buy-in. Even then, each of the individual action items would need to travel through the same mandated approval processes as any other such proposals.

The following *Implementation Matrix* provides detail on these recommendation items, including the following:

- Area – Bucket, with recommendations assigned to one of four “buckets”, which include: (1) Marketing, (2) Incentives, (3) Zoning and (4) Capital Improvements.
- Specific Action Item(s), with specifics on what the proposal consists of and requires.
- Time Horizon for Implementation – ranging from 0 to 1 years (short-term), 0 to 3 years (short- to medium-term) and

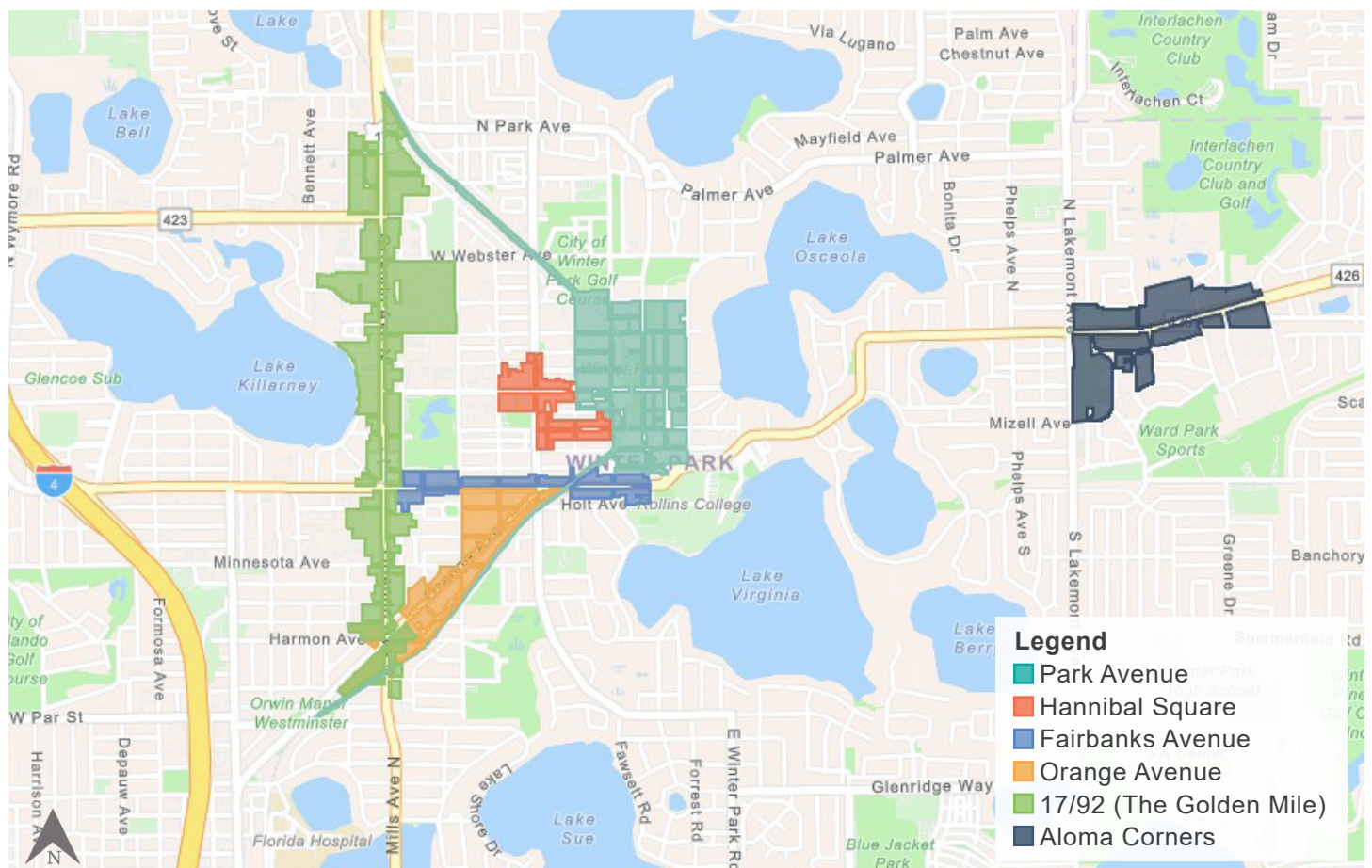
3+ years (long-term), as based on the need for adjustments or deeper dives, the process for securing buy-in as well as the practicalities of capacity, timing and priority.

- Chief Sponsor(s), including those spearheading execution, supplying funding and/or otherwise impacted.
- Context/Commentary, summarizing the reasoning and rationale.

Briefly, the three most immediate priorities that emerged from this exercise are as follows:

1. Creation and dissemination of retail marketing collateral.
2. Tweaks and adjustments to C-2 Zoning
3. Incentives for comparison goods retailers in Park Avenue Corridor.

Focus Districts and Corridors in Winter Park



KEY THEMES AND CONCEPTS

Some of the key themes and concepts that emerged from the analysis in Phase I, as useful context for what has been proposed within the *Implementation Matrix*, include the following:

LOCATION DRIVERS

The extent to which the site-location decisions of prospective retail tenants are driven by considerations of “co-tenancy”, that is, the nearby businesses that generate relevant cross-traffic.

CRITICAL MASS

The need for established shopping destinations, particularly ones specializing in comparison goods, to retain a “critical mass” (or remain above a certain threshold) of such stores.

GROUND FLOOR TENANCY

The importance of active retail tenancies on the ground floor of walkable districts and along the frontage of commercial corridors (to preserve such spaces for uses with the greatest need for high visibility)—in cases where tight market conditions prevail.

WINTER PARK RETAIL ECOLOGY

The understanding of Winter Park’s districts and corridors as a retail ecology or hierarchy, with the tight market for retail space in one creating “spillover” tenant demand in others.

ZONING & POLICIES

The accompanying notion that the city’s overall retail potential can only be maximized by grounding policies (including zoning) in such dynamics, even if in some cases that implies different expectations for individual properties and stakeholders.

INTERESTING MIX OF TENANCIES

The roles that development economics, permitted uses and rent expectations play in street-level vitality, with strategically-zoned, “second-generation” spaces often priced at levels that can be sustained by a broader and more interesting mix of tenancies.

FLEXIBILITY AS PRE-EMPTION

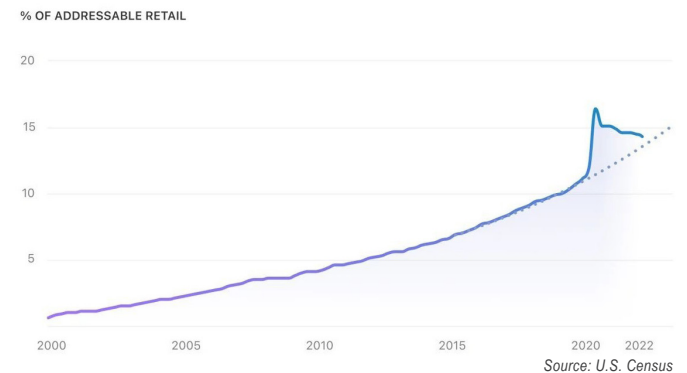
The realization that flexibility—in policy, zoning, approvals, and permitting—will be essential to keeping Winter Park relevant and differentiated in a rapidly-evolving and fiercely-competitive industry.

THE PRIMACY OF SUPPLY AND DEMAND

The recognition that market forces—specifically, supply and demand variables—can often dictate retail conditions and opportunities to a greater extent than the physical and design attributes of roads and buildings.

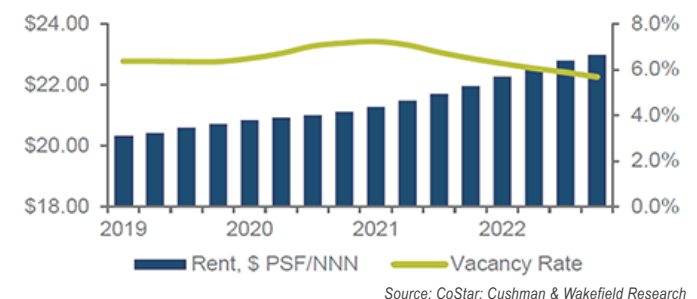
DEFINITION: “Retail” for the purposes of this scope-of-work has been defined broadly, to include any ground-floor uses that are consumer-facing—that is, welcoming potential customers either on a walk-in or subscription basis. This would encompass, then, personal services, food and beverage as well as entertainment venues, while precluding businesses that operate exclusively or primarily by appointment.

US Ecommerce Adoption Growth Rate



CAPTION: **No, e-commerce has *not* taken over:** By 2022, the market share of online sales was roughly similar to where it would have been without the pandemic, given historic growth rates.

Overall Vacancy & Asking Rent



CAPTION: **What Retail Apocalypse?** Despite pandemic-era disruption, the market for retail space was robust in 2021 and most of 2022, with declining vacancy rates and rising asking rents.

IMPLEMENTATION MATRIX

Area – Bucket	Specific Action Item(s)	Time Horizon
Retail Marketing Collateral – MARKETING	Draft, refine, finalize and produce brochure, in physical and digital formats, that frames and sells Winter Park as a retail location to prospective tenants, tenant-rep brokers and other industry professionals, including inserts and tabs about specific districts as well as a sleeve for property-specific fliers.	Short Term (0-1 years)
Consumer Marketing – MARKETING	Develop and promulgate a multi-channel marketing campaign that targets theme park visitors and Central Florida residents with more elevated tastes and preferences, including tabs and inserts about specific districts.	Short to Medium Term (0-3 years – depending on sponsor response)
Place Management Entities – MARKETING/ CAPITAL IMPROVEMENTS	With the help of an established consultant, explore different models for a non-profit, “place management” entity for Park Ave—perhaps as an outgrowth to the Park Avenue District—that spearheads beautification efforts, stages events and promotions, coordinates marketing campaigns, facilitates economic development as well as advocates on behalf of the district and its stakeholders, among other predetermined responsibilities; provide support as well for nascent efforts to create “Main Street” or other such “voluntary” organization(s) in Hannibal Square and Orange Avenue, perhaps as outgrowth(s) of existing merchant association(s).	Short to Medium Term (0-3 years – allowing time for the Park Avenue District to “grow” into such a role and for efforts in other districts to cohere)

Chief Sponsor(s)	Context/Commentary
City of Winter Park, with support from leasing professionals, the Park Avenue District and the Winter Park Chamber of Commerce.	Retailers and brokers active in Central Florida certainly know about Winter Park, but the purpose here would be to deepen awareness of the opportunity in analogous markets further afield --like, for instance, St. Armands Circle (Sarasota), Chatham (Cape Cod), Cherry Creek North (Denver), Claremont Village (Los Angeles), etc., with the ultimate goal of catapulting Winter Park into the upper echelon of retail locations nationwide; such a piece would provide ammunition with which developers, landlords and leasing professionals can make a broader community/district-level pitch that would accompany their property-specific efforts; it should be updated digitally on a semi-annual basis, and in print, annually.
Winter Park Chamber of Commerce, with support from the Park Avenue District, the City of Winter Park, local hotels, Rollins College, Morse Museum and other relevant stakeholders.	Winter Park and Park Ave is still leaving money on the table in the absence of a proactive effort to capture the attention and spending of the subset of visitors that yearn for a more mature and upmarket alternative or accompaniment to the traditional Orlando tourist experience, who, while perhaps accounting for just a tiny percentage of the overall pie, nonetheless account for a large absolute number; at the same time, preemptive action is needed to ensure that Park Ave remains metro Orlando's premier "Main Street" experience in the minds of Central Florida residents, given the ascendancy of newer competitors such as Winter Garden, Mt. Dora, etc.
Park Avenue District, the Winter Park Chamber of Commerce, the City of Winter Park and landlords/ merchants, with the requisite buy-in from relevant stakeholders (in the case of Park Avenue, as part of a mandated process).	While it can take several forms (e.g. BID, SID, NID, Main Street, etc.), the benefits of such an entity for Park Avenue include the following: 1) a guaranteed funding mechanism from the additional assessment (thereby greatly reducing the dependence on City grants, private fundraising, revenue-generating events, etc. and providing greater certainty for multi-year initiatives); 2) hedge against recession-triggered decline in municipal tax base; 3) a voice and forum for property and business owners; 4) a more entrepreneurial approach to addressing district needs and challenges; 5) a mechanism for coordinating provision of collective goods; and 6) greater marketing clout for small businesses—as an approximation of the role of a mall manager but for a Downtown setting with multiple stakeholders; in contrast, the models proposed for other Winter Park districts would not involve automatic assessments and would only offer benefits #3 through #6 above.

CONTINUATION OF IMPLEMENTATION MATRIX

Area – Bucket	Specific Action Item(s)	Time Horizon
C-2 Zoning – ZONING	Consider appropriate tweaks and adjustments to the Commercial (C-2) district (Sec. 58-75) for the commercial portion of the central business district as well as definitions particularly relevant thereto: 1. Simplify definitions of different kinds of eating and drinking establishments so as to align more closely with industry terminology and understanding; 2. Raise threshold for revenue from take-out orders to qualify as a fine-dining restaurant; 3. Allow for greater flexibility in changes to “core business” (i.e. mix of goods and services) before requiring a new application to the City (e.g. for business tax receipt); and 4. Prohibit “churches, nonprofit organizations’ halls/ lodges and schools less than 5,000 sq. ft. in size)” in the ground-floor of properties having frontage on Park Avenue or along intersecting streets within 140 feet of Park Avenue.	Short Term (0-1 years)
Comparison Goods Retailers in the Park Avenue Corridor – INCENTIVES	Explore different sorts of incentives for existing and perspective tenants in comparison goods categories (e.g. apparel, footwear, jewelry, accessories, home goods, gifts, art, etc.), like, for instance, forgivable loans and fee waivers with interior build-out and/or modernization.	Short Term (0-1 years)
Role for Rollins College – INCENTIVES	Partner with Rollins College and other stakeholders on a broader retail vision and tenanting approach along Fairbanks Avenue that can help to create a more compelling “college-town” environment for the school’s roughly 3,100 students, leveraging their presence to attract amenities that the general public can also enjoy, with Rollins, for instance, contracting with a new operator for a hybrid college/general bookstore and considering leases with other such broadly-desired businesses.	Short to Medium Term (0-3 years)

Chief Sponsor(s)	Context/Commentary
City of Winter Park, with input and buy-in from the Winter Park Chamber of Commerce, the Park Avenue District and Park Ave landlords/merchants.	Chief arguments for each of these proposed modifications are as follows: 1. The language used to define different kinds of restaurants—for the two worthwhile and appropriate goals of protecting against fast food in particular and avoiding a proliferation of restaurants more generally—is confusing and leaves too much room for discretion, deterring prospective tenants that long for clarity and predictability; 2. The current 10% threshold does not account for the growth in “off-premise” dining that took hold amidst the pandemic. According to data from the NPD Group, off-site consumption accounted for 33% at full-service restaurants nationwide (versus 19% pre-pandemic); 3. Making such tweaks too onerous risks hampering the ability of individual businesses to respond nimbly to shifts in consumer tastes and preferences, which helps to keep the overall mix fresh and current; and 4. These uses would remove precious ground-floor inventory that could otherwise be occupied by more synergistic tenants which add to Park Avenue’s critical mass.
City of Winter Park and/or the CRA, with input and buy-in from the Winter Park Chamber of Commerce, the Park Avenue District and Park Ave landlords/merchants.	Park Avenue’s appeal as a shopping destination for comparison goods is a large part of what differentiates it among other competing Downtowns in the region, yet preserving and fortifying such primacy requires a meaningful commitment to retaining the critical mass in such categories, as such shops are often outflanked by other uses (e.g. eating and drinking establishments) on a level playing field; note that the purpose is not so much to promote individual small businesses but rather, to entice certain kinds of retailers (including well-capitalized ones that do not technically need the support) so as to protect the overall mix and defend a position in the marketplace.
City of Winter Park, Rollins College and Fairbanks Ave landlords/merchants.	Fairbanks Avenue has long ranked as Winter Park’s most underwhelming commercial corridor, yet it is the prime gateway to Park Avenue as well as the front door to Rollins College, which would seem to have the mandate, the incentive and the financial wherewithal to reinvigorate the two-block stretch it primarily owns and controls so as to better compete with prospective students, professors and researchers (as well as engender good will as a tax-exempt institution)—similar to how many other elite colleges and universities across the country, in partnership with local government, have acted aggressively to elevate their surroundings for such purpose (even at the expense of their portfolio’s operating margins).

CONTINUATION OF IMPLEMENTATION MATRIX

Area – Bucket	Specific Action Item(s)	Time Horizon
Fairbanks Avenue as Gateway – CAPITAL IMPROVEMENTS	Continue with ongoing efforts to beautify the Fairbanks Avenue corridor from the I-4 exit to Park Avenue while also, perhaps with the help of a transportation consultant, assessing ways to improve traffic flow as well as enhance automobile access and visibility for adjoining business.	Short to Medium Term (0-3 years)
Zoning in Orange Avenue Corridor – ZONING	Consider appropriate tweaks and adjustments to the Orange Avenue Overlay District (Ordinance 3228-21): 1. Require conditional use permits for certain personal services (e.g. spas, massage, cosmetic treatment) and “quasi-retail tenancies” (e.g. financial institutions, professional offices, medical/dental clinics) at street level, while limiting entrances, leasing or management offices and residential amenities (e.g. health/fitness, meeting/activity room, storage) in mixed-use buildings to no more than 15% of the ground floor; 2. Loosen restrictions on resale/stores as a permitted use; 3. Allow retail businesses to use a limited percentage of their floorplates for other purposes besides sale of merchandise to on-premises customers; and 4. Provide greater clarity and less room for subjectivity in the distinction between “fast food”, which is prohibited, and “fast-casual”, which is permitted.	Short to Medium Term (1-3 years)
Off-Street Parking in the Orange Avenue Corridor – CAPITAL IMPROVEMENTS	With the help of an appropriate consultant, consider a special assessment district that identifies and secures a centrally-located parcel for as well as funds the design, construction and management of a public parking structure in or near the Orange Avenue Corridor; and, if realized, relax requirements for off-street parking in said Corridor (e.g. for redevelopment that adds square footage, change-of-use to food and beverage, etc.) as well as extend the distance threshold from 750 to 1,320 feet.	Long Term (3+ years)

Chief Sponsor(s)	Context/Commentary
City of Winter Park, State of Florida, the Winter Park Chamber of Commerce, Rollins College and Fairbanks Avenue landlords/merchants.	As the primary route between I-4 and Park Avenue/Rollins College, Fairbanks Avenue serves as the gateway to Winter Park for most visitors, yet in its current appearance, the City’s recent investments notwithstanding, it still does not always reflect the higher standards and upmarket positioning for which the community is known, nor does it offer what is perceived as a viable alternative for uses prohibited, requiring a conditional use permit or otherwise unable to secure locations along 17/92 (see below); at the same time, leasing efforts and customer volumes along the corridor are reportedly constrained by both poor access (e.g. left turns heading eastbound are extremely difficult at certain times of day) as well as compromised visibility (e.g. navigation provides few opportunities for motorists to take notice of the businesses that they are passing).
City of Winter Park, with input and buy-in from Orange Avenue landlords/merchants.	Chief arguments for each of these proposed modifications are as follows: 1. Such tenancies do not typically generate much street-level interest in, widespread excitement about or destination appeal for the district, nor do they provide more than limited spin-off for nearby businesses; 2. Vintage/resale has long been popular among neo-hipsters while no longer carrying quite the same stigma more broadly (as evidenced by the proliferation of stores selling “designer consignment”); 3. With the rise of “omni-channel” business models, retailers are increasingly valuing and utilizing brick-and-mortar spaces for multiple purposes, including fulfillment for on-line delivery; and 4. Gourmet “foodie” dining among younger generations often takes a fast-casual form (without the attributes of traditional “fine” dining, e.g. reservations, waiters, white tablecloths, etc.), yet differentiation vis-à-vis fast food that is based solely on what constitutes “freshly-prepared, higher-quality food” leaves prospective tenants vulnerable to personal tastes and discretion, resulting in a lack of predictability that can act as a deterrent.
City of Winter Park, with input and buy-in from Orange Avenue landlords/merchants.	Redevelopment and re-tenanting in the corridor is currently challenged—and traffic congestion exacerbated—by a number of undersized, under-parked properties, while the benefits of a new parking scheme will no doubt accrue to the owners and tenants of the same; planners and urban designers routinely define “walking distance” as a quarter-mile radius, which translates to 1,320 feet.

CONTINUATION OF IMPLEMENTATION MATRIX

Area – Bucket	Specific Action Item(s)	Time Horizon
Zoning for 17/92 and Fairbanks Avenue – ZONING	Consider changes in the ordinance which create different rules for 17/92 (north of Orange Avenue) and Fairbanks (west of Denning Avenue), both of which are largely designated as Commercial (C-3): 17/92 – as the “A” commercial corridor, with the following permitted: theaters, restaurants, bars, taverns and cocktail lounges, fitness facilities, exercise or health clubs, buildings over 10,000 sq ft (or any addition over 500 sq ft to such a building, etc.); with the following requiring conditional use permits (and prohibited along the frontage): personal or business services (including banks or similar financial institutions), business, financial, governmental, medical and professional offices, agencies and clinics, blueprinting, photocopying and printing offices, animal hospitals, veterinary clinics and other animal case businesses; and with the following prohibited in any location: funeral homes and cemetery monument sales, churches, community clubs, nonprofit organizations’ halls/lodges and schools, publicly-owned recreational facilities, repair and servicing of motor vehicles (also, as an ancillary use to a vehicle sales showroom), paint and body shops, office/showroom/warehouse uses, conditional uses provided in the R-3 and R-4 districts; and Fairbanks Avenue – as the “B” commercial corridor, with the same as the existing Commercial (C-3) zoning except that the following are also permitted: fitness facility, exercise or health clubs; Shopping Centers designated as Commercial (C-1): revise in accordance with the above classifications, depending on corridor.	Long Term (3+ years)
Approvals and Permitting Process – INCENTIVES	Undertake a comprehensive review of the current process that prospective retail tenants must navigate in order to secure necessary approvals and permits, including (but not limited to) consideration of a new, more flexible approach for evaluating proposed uses and tenancies that acknowledges today’s rapidly-evolving and fiercely-competitive retail industry.	Long Term (3+ years)

Chief Sponsor(s)	Context/Commentary
City of Winter Park, with input and buy-in from landlords/merchants on 17/92 and Fairbanks Avenue.	1) 17/92 and Fairbanks Avenue currently occupy very different positions in the ecology and hierarchy of Winter Park retail, suggesting different approaches to land use and zoning, with the following goals: (i) reserving the precious real estate along the space-constrained “Golden Mile” (and especially the frontage) for the tenancies with the greatest need for such visibility and access as well as the most potential for generating widespread interest; and (ii) establishing Fairbanks Avenue as a more viable alternative for uses prohibited, requiring a conditional use permit or otherwise unable to secure locations along 17/92; In addition, the requirement for a conditional use permit for any building of 10,000 sq ft or more seems overly restrictive for a corridor like 17/92 with so many big and medium-box uses; and 2) With the rise of “omni-channel” business models, retailers are increasingly valuing and utilizing brick-and-mortar spaces for multiple purposes, including fulfillment for on-line delivery and distribution for wholesale -- which seems especially appropriate for commercial corridors with large-floor plate tenancies, surface-parking fields, loading docks, etc.
City of Winter Park, with requisite buy-in from relevant stakeholders as part of a mandated process.	Prospective retail tenants frequently cite approvals and permitting as a decisive factor in where they do and do not choose to locate, and can be deterred by processes which provide ample opportunity for elected officials and staff planners to inject their subjective tastes and preferences into the process; at the same time, the conventional approach of prohibiting any use not specifically enumerated in (a periodically-updated) zoning code has always been unable to “keep up” with changes and innovations in retail tenancy -- and never more so than now, with new concepts and formats (as well as combinations thereof) emerging at an especially fast clip, and with the need to stay ahead of and differentiated from the competition (both physical and digital) becoming ever more urgent.

Prepared By:



618 E. South St.
Suite 700
Orlando, FL 32801
T 407-423-8398

gaiconsultants.com/communitysolutions



85 Fourth Avenue
Suite 6A
New York, NY 10003
T 917-816-8367

info@consultmjb.com



Economic
Development
Advisory Board

agenda item

item type Staff Updates	meeting date June 13, 2023
prepared by Kyle Dudgeon	approved by
board approval	
strategic objective	

subject

EDAB Commercial Performance Report

motion / recommendation

N/A

background

Monthly reports as requested

alternatives / other considerations

fiscal impact

ATTACHMENTS:

[Park Avenue.Hannibal ped counters May 2023.pdf](#)

ATTACHMENTS:

[EDAB Commercial Performance Report - June 2023.pdf](#)

ATTACHMENTS:

[Event Overview - Spring Arts Festival, Spring Arts Festival .pdf](#)

City of Winter Park

Kyle Dudgeon
06/07/2023



Key Figures

May 1, 2023 → May 31, 2023

Total

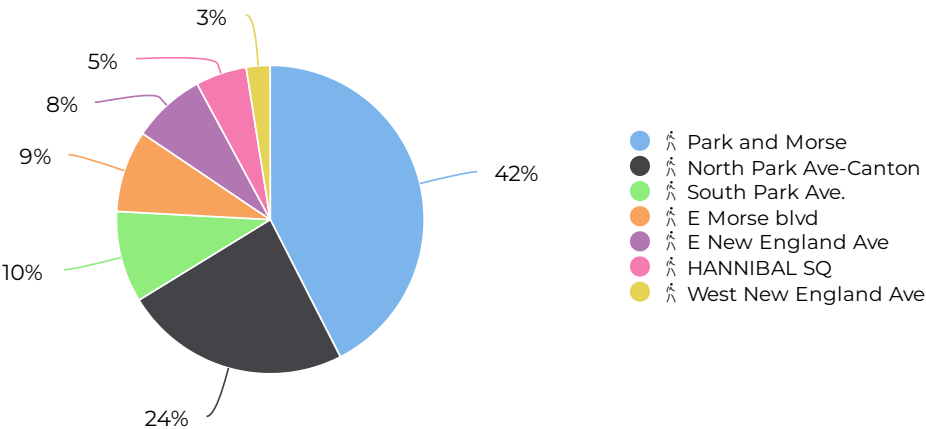
232,550

Peak Day

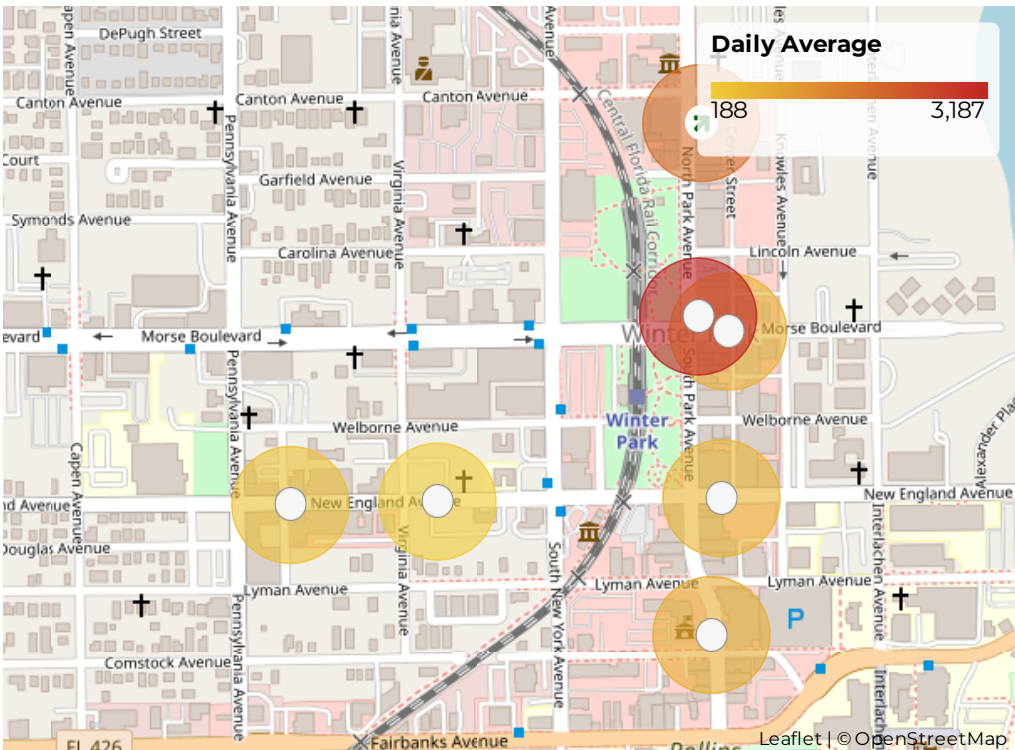
Saturday
May 13, 2023

15,198

Distribution



Key Figures Map

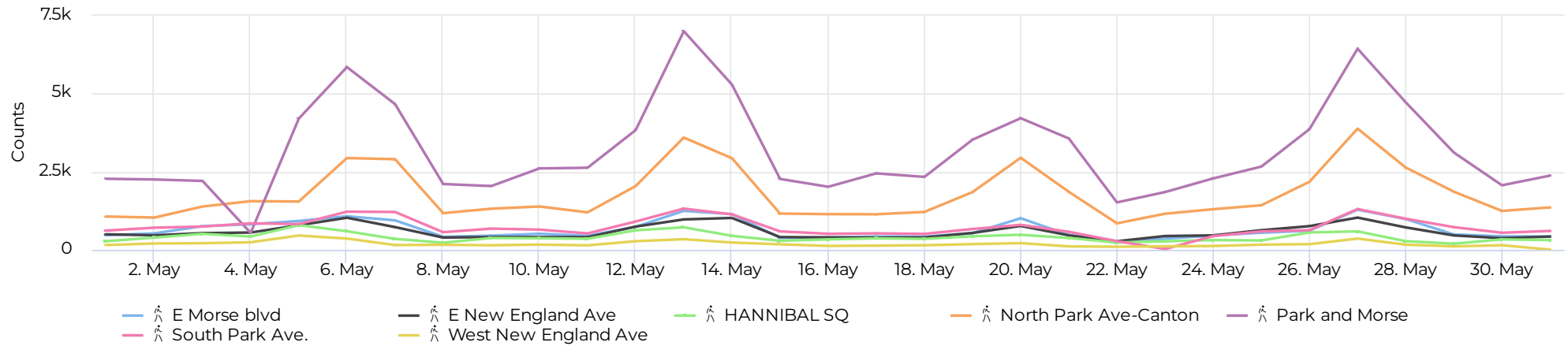


Compared to 05/02/2022 → 06/01/2022

Key Figures

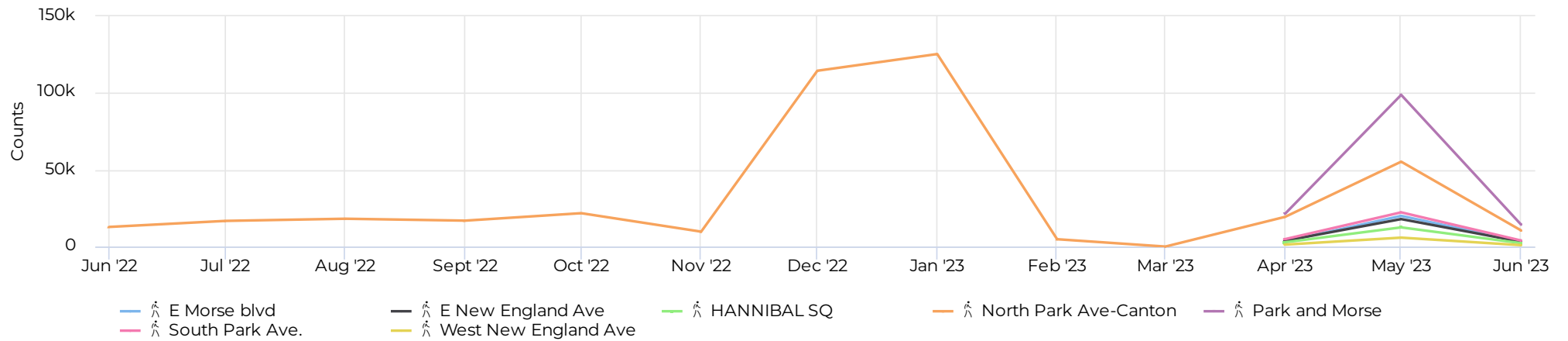
May 1, 2023 → May 31, 2023

Daily traffic



Monthly traffic

06/07/2022 → 06/06/2023

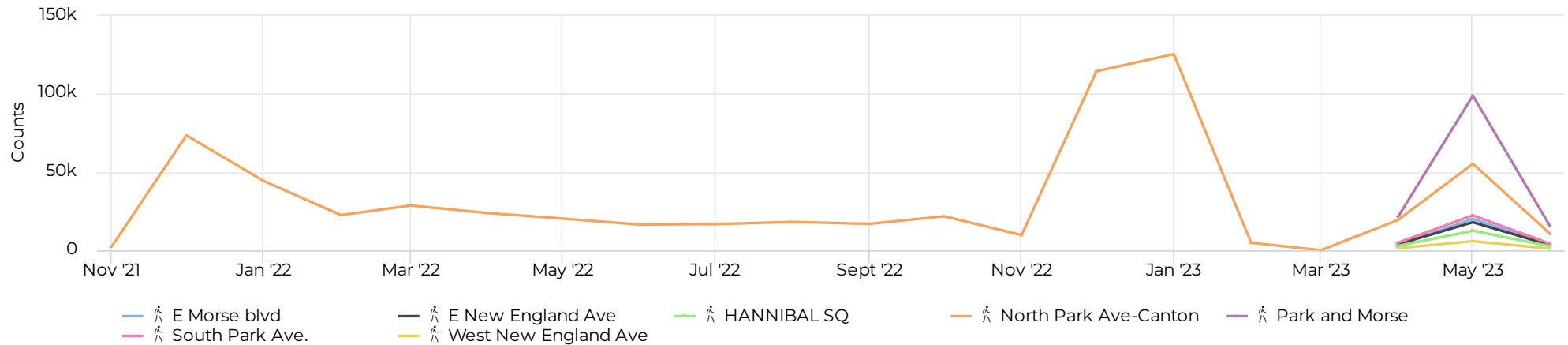


Key Figures

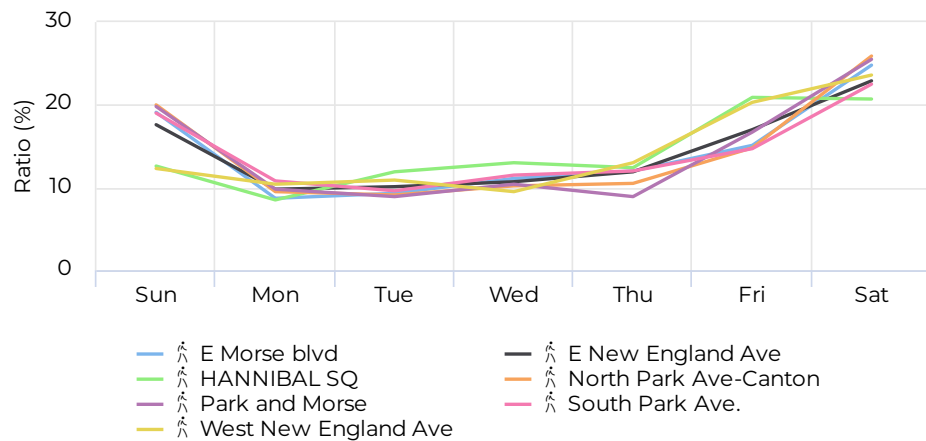
May 1, 2023 → May 31, 2023

Monthly traffic

📅 Whole Period

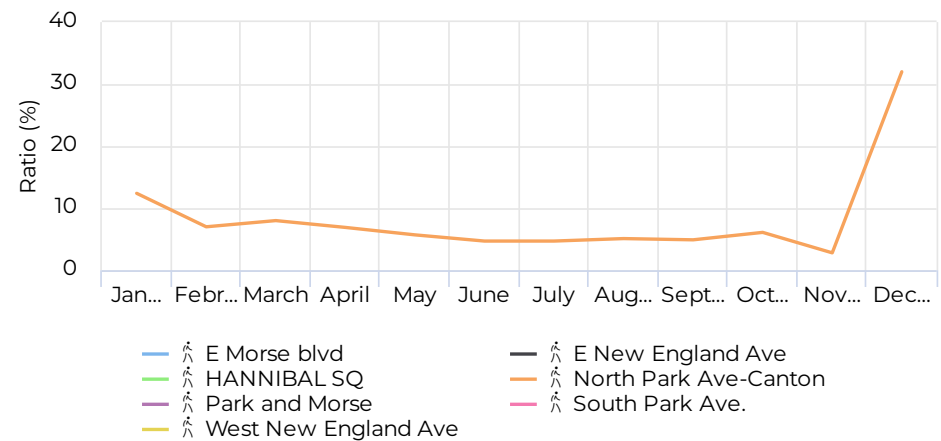


Daily Profile



Monthly Profile

📅 01/01/2022 → 12/31/2022

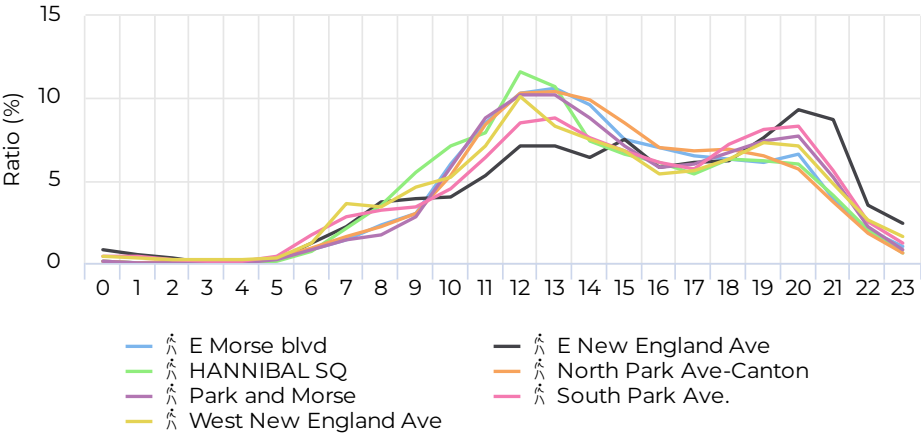


Key Figures

May 1, 2023 → May 31, 2023

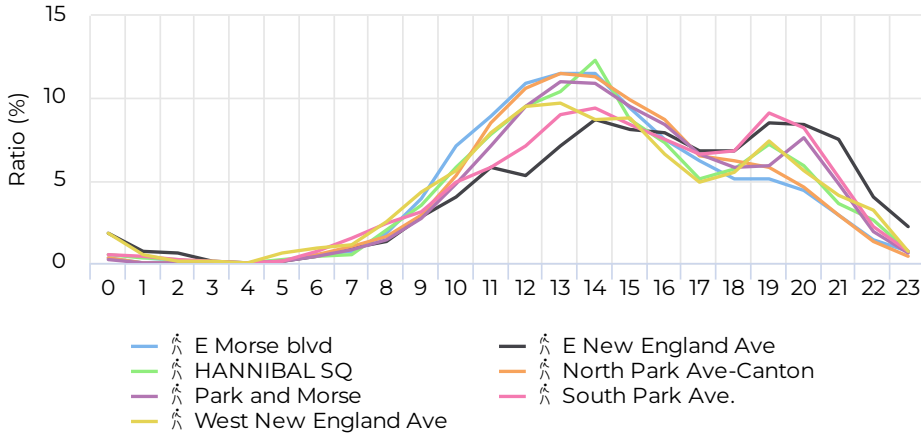
Hourly Profile - Weekdays

01/01/2023 → 06/06/2023



Hourly Profile - Weekend

01/01/2023 → 06/06/2023



Key Figures

May 1, 2023 → May 31, 2023

Key Figures Summary

Site	Daily Average ▼		Peak Day		Peak Count	
Park and Morse	3,187		Sat May 13, 2023		7,001	
North Park Ave-Canton	1,784	▲ 177.4%	Sat May 27, 2023	Sat May 7, 2022	3,881	▲ 217.3%
South Park Ave.	719		Sat May 13, 2023		1,320	
E Morse blvd	644		Sat May 27, 2023		1,285	
E New England Ave	577		Sat May 27, 2023		1,032	
HANNIBAL SQ	403		Fri May 5, 2023		791	
West New England Ave	188		Fri May 5, 2023		458	

📈 Compared to 05/02/2022 → 06/01/2022

Commercial Performance Report

6/23

Full list of quarterly reports including annually recorded metrics are available at www.cityofwinterpark.org/pm

Sources: ESRI, CoStar, BLS

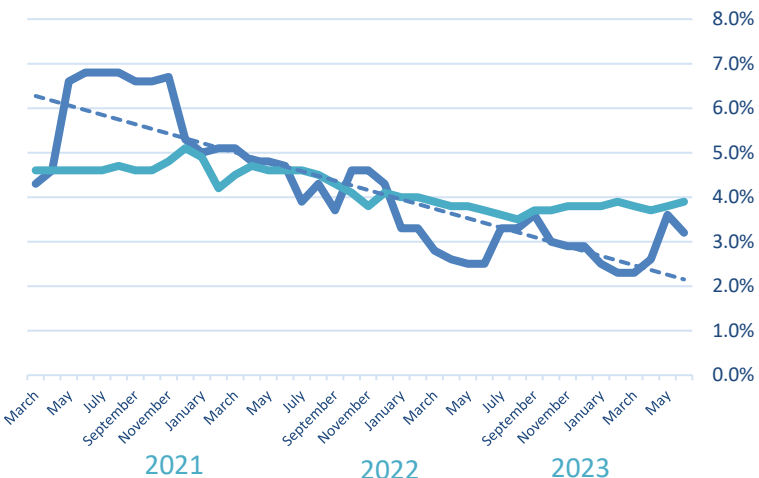
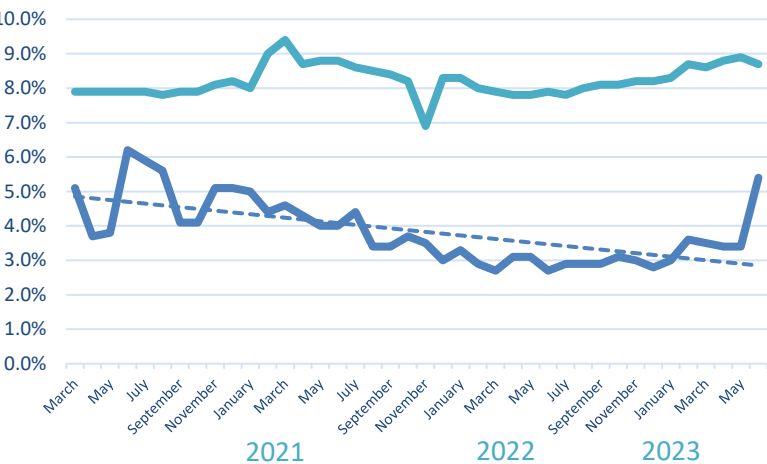
OFFICE

Vacancy

RETAIL

Winter Park Orlando MSA

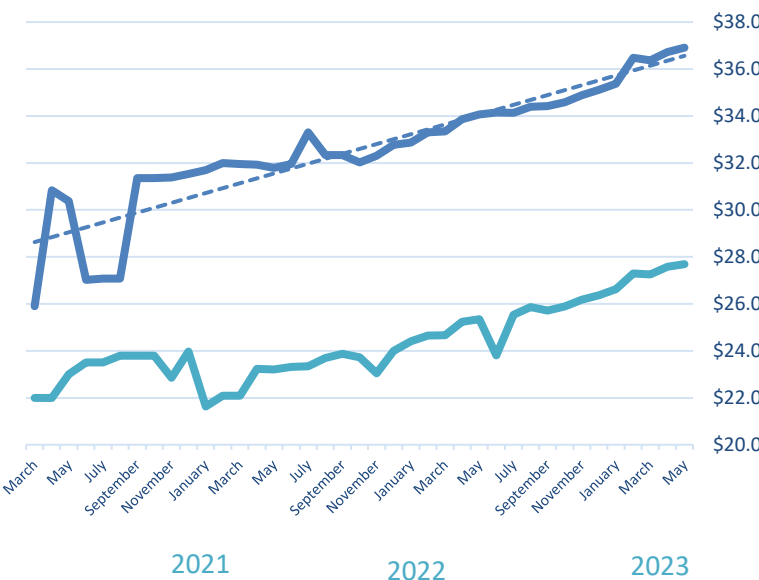
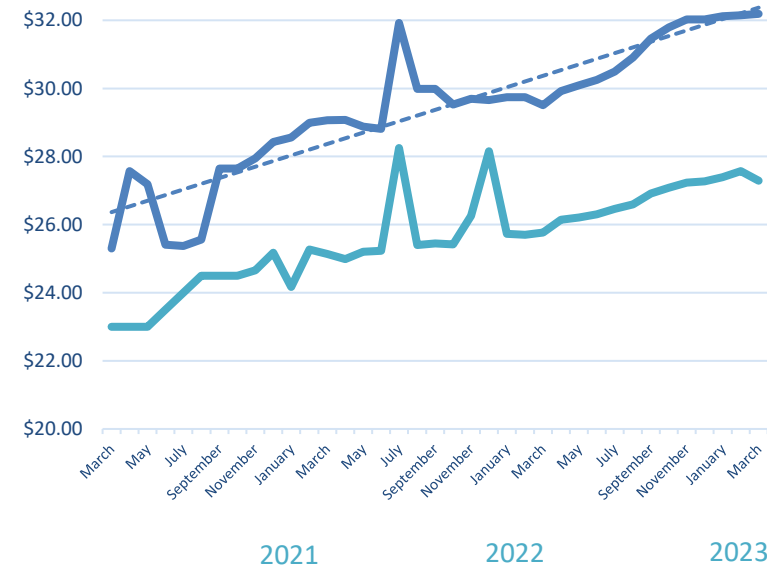
Winter Park Orlando MSA



Rental Rate

Winter Park Orlando MSA

Winter Park Orlando MSA



Property Overview

Property:

SA

Spring Arts Festival

Winter Park, FL, United States

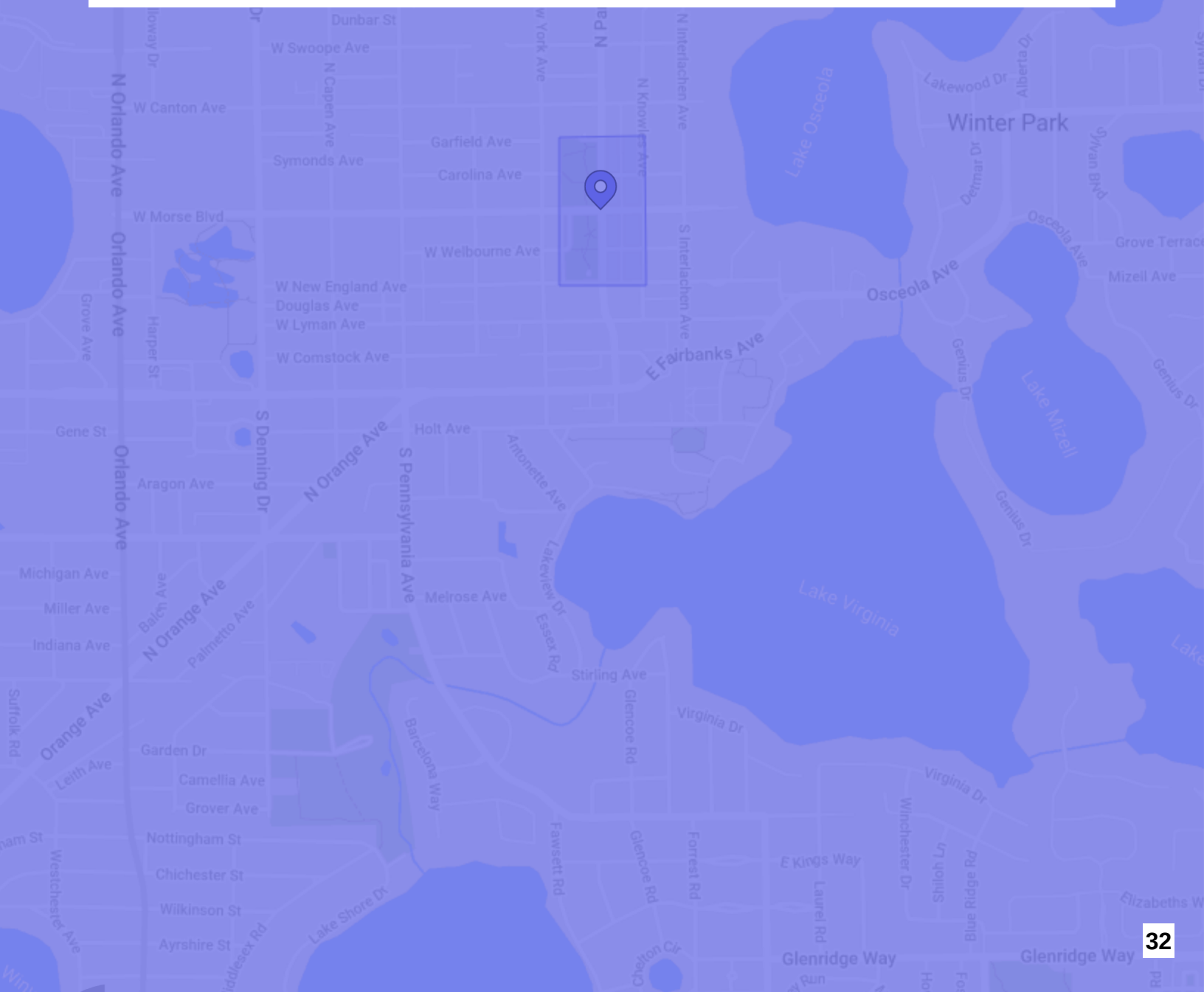
Mar 18 - Mar 20, 2022

SA

Spring Arts Festival

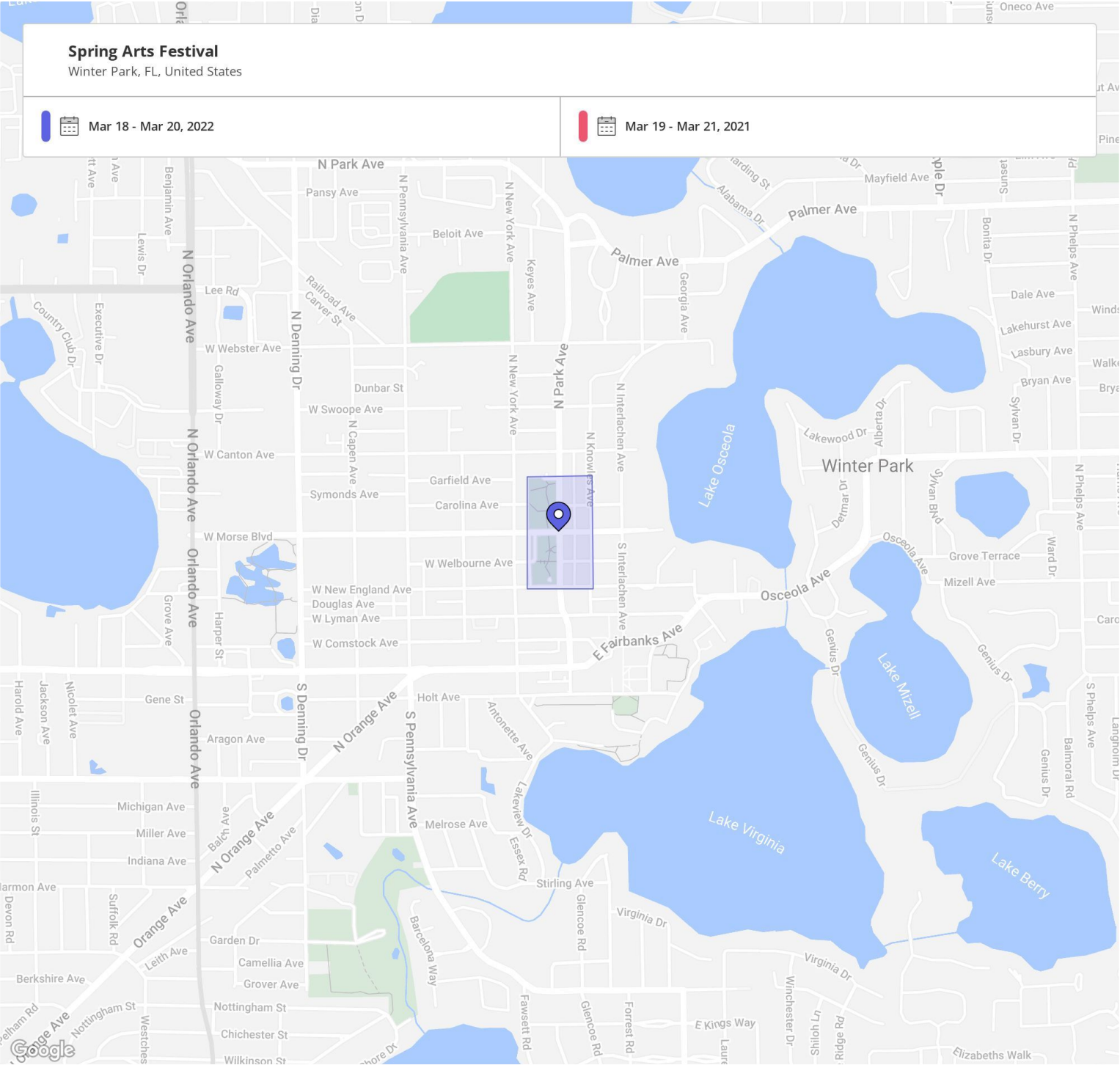
Winter Park, FL, United States

Mar 19 - Mar 21, 2021



Property Overview

Time Compare



Property Overview

Time Compare

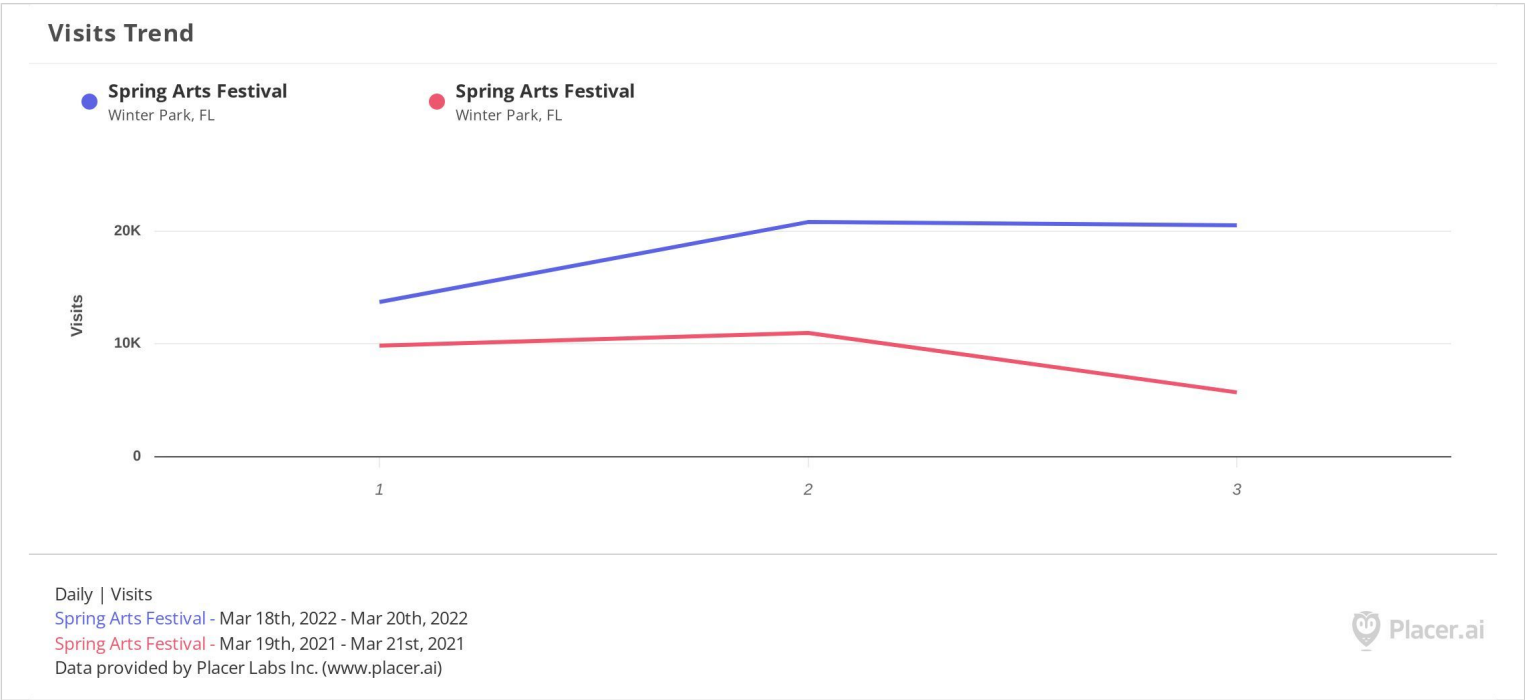
Metrics		
Metric Name	Spring Arts Festival Winter Park, FL	Spring Arts Festival Winter Park, FL
Visits	55K	26.5K
Visitors	50.3K	24.7K
Visit Frequency	1.09	1.07
Panel Visits	1.8K	659

Spring Arts Festival - Mar 18th, 2022 - Mar 20th, 2022

Spring Arts Festival - Mar 19th, 2021 - Mar 21st, 2021

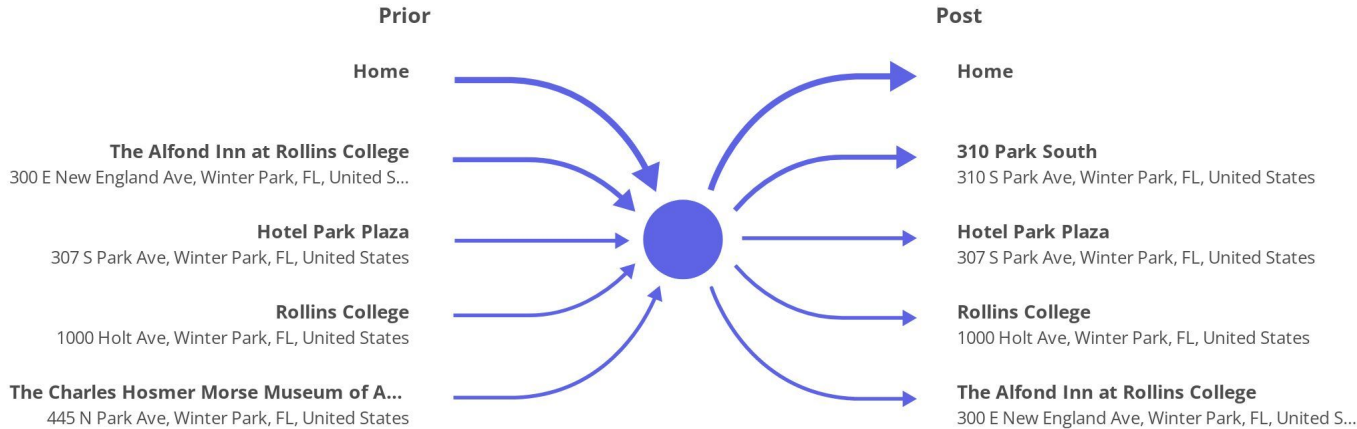
Data provided by Placer Labs Inc. (www.placer.ai)





Visitor Journey

● **Spring Arts Festival**
, Winter Park, FL 32789, 32792

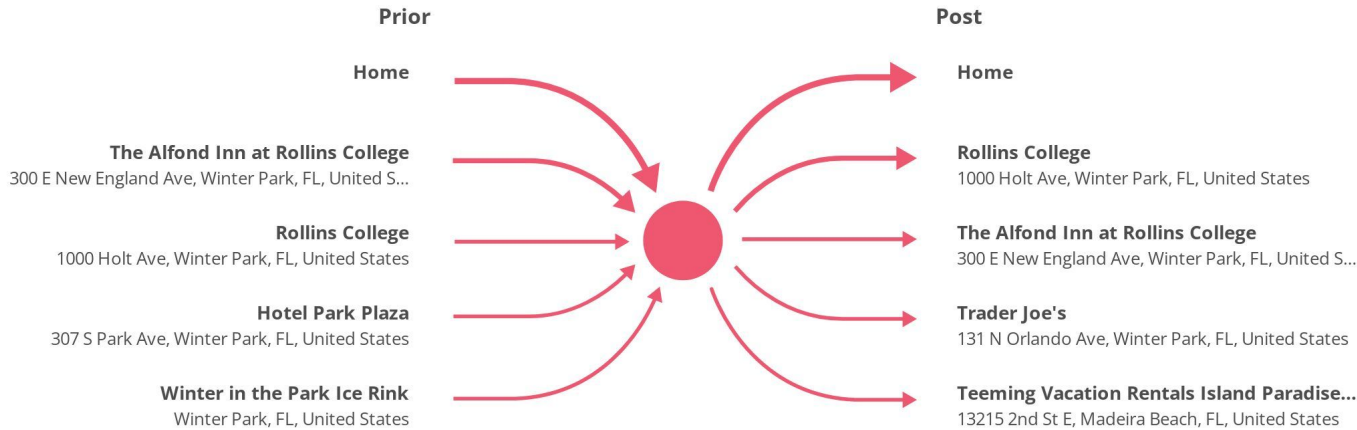


Show by: Location | Mar 18th, 2022 - Mar 20th, 2022
Data provided by Placer Labs Inc. (www.placer.ai)



Visitor Journey

● **Spring Arts Festival**
, Winter Park, FL 32789, 32792



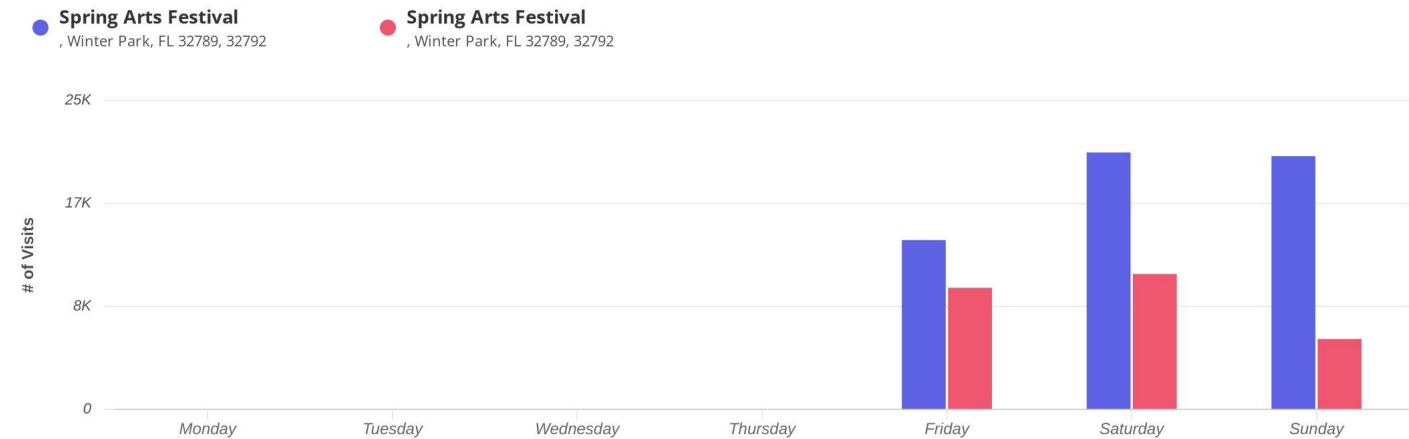
Show by: Location | Mar 19th, 2021 - Mar 21st, 2021
Data provided by Placer Labs Inc. (www.placer.ai)



Property Overview

Time Compare

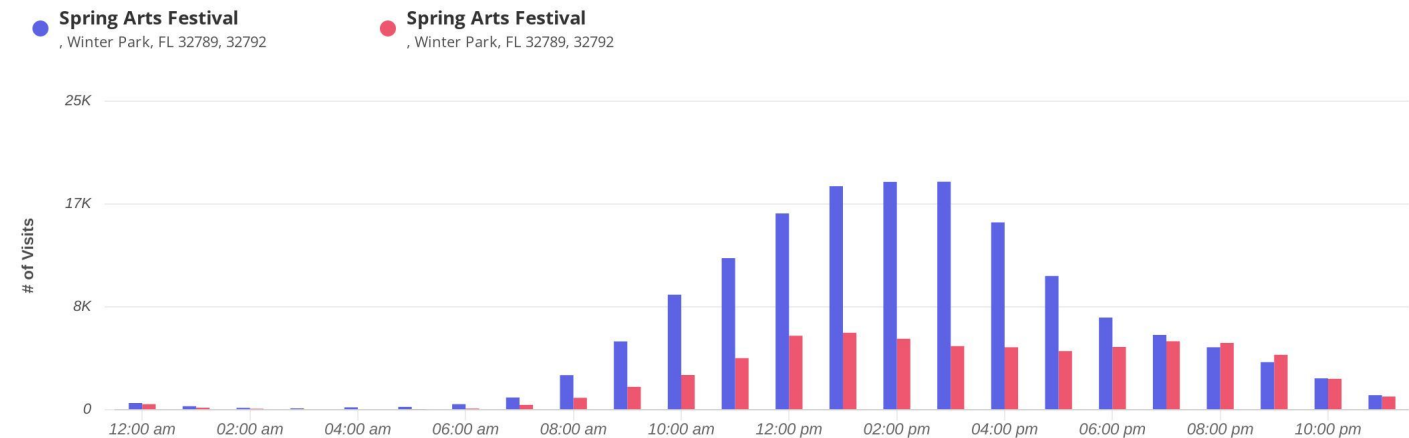
Daily Visits



Visits
Spring Arts Festival - Mar 18th, 2022 - Mar 20th, 2022
Spring Arts Festival - Mar 19th, 2021 - Mar 21st, 2021
Data provided by Placer Labs Inc. (www.placer.ai)



Hourly Visits



Visits
Spring Arts Festival - Mar 18th, 2022 - Mar 20th, 2022
Spring Arts Festival - Mar 19th, 2021 - Mar 21st, 2021
Data provided by Placer Labs Inc. (www.placer.ai)



Property Overview

Time Compare

Favorite Places

Spring Arts Festival / Winter Park, FL			
Rank	Name	Distance	Visitors
1	Hotel Park Plaza / 307 S Park Ave, Winter Park, FL 32789	0.1 mi	6.4K (12.7%)
2	Winter Park Station / 148 W Morse Blvd, Winter Park, FL 32789	0.1 mi	4.7K (9.3%)
3	Winter Park Village / 510 Orlando Ave, Winter Park, FL 32789	0.8 mi	4K (8.1%)
4	Shops on Park / 200-218 N Park Ave, Winter Park, FL 32789	0.1 mi	3.7K (7.4%)
5	Lakeside and Lakeside Crossing / 111- 131 North Orlando Avenue, Winter Park, FL 32789	0.9 mi	3.2K (6.4%)
6	Waterford Lakes Town Center / 413 North Alafaya Trail, Orlando, FL 32828	9.6 mi	2.9K (5.7%)
7	Orlando International Airport / 1 Jeff Fuqua Blvd, Orlando, FL 32827	11.8 mi	2.5K (5%)
8	Peterbrooke Chocolatier / 300 S Park Ave, Winter Park, FL 32789	0.1 mi	2.2K (4.4%)
9	SunTrust Plaza / 400 S Park Ave STE 100, Winter Park, FL 32789	0.2 mi	2.2K (4.4%)
10	Altamonte Mall / 451 E Altamonte Dr, Altamonte Springs, FL 32701	4.9 mi	2.1K (4.3%)

Category: All Categories | Min. Visits: 1
[Spring Arts Festival](#) - Mar 18th, 2022 - Mar 20th, 2022
[Spring Arts Festival](#) - Mar 19th, 2021 - Mar 21st, 2021
Data provided by Placer Labs Inc. ([www.placer.ai](#))



Property Overview

Time Compare

Favorite Places

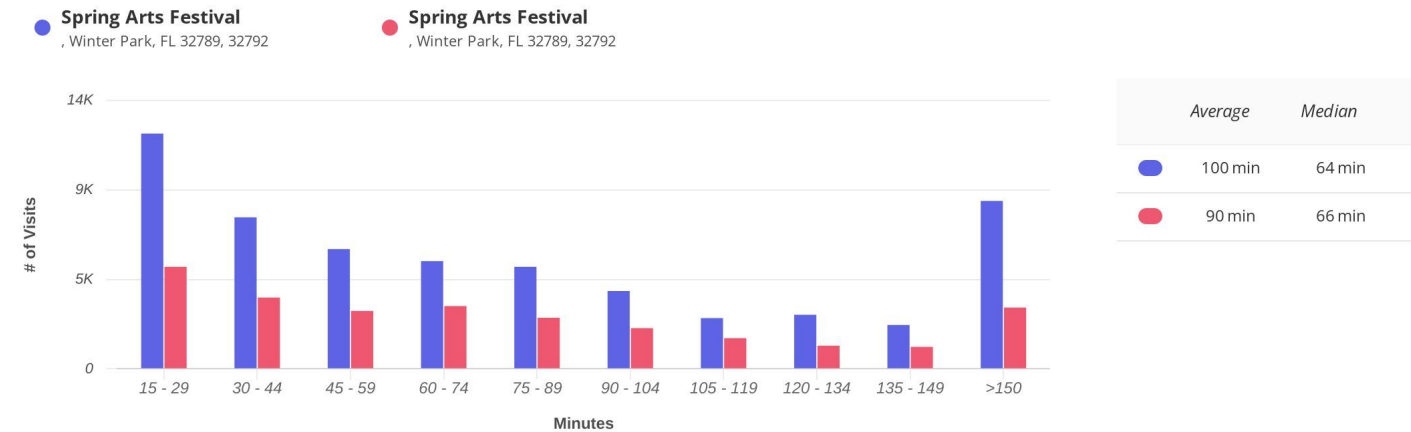
Spring Arts Festival / Winter Park, FL

Rank	Name	Distance	Visitors
1	Winter Park Station / 148 W Morse Blvd, Winter Park, FL 32789	0.1 mi	2.1K (8.7%)
2	Lakeside and Lakeside Crossing / 111- 131 North Orlando Avenue, Winter Park, FL 32789	0.9 mi	1.9K (7.9%)
3	Hotel Park Plaza / 307 S Park Ave, Winter Park, FL 32789	0.1 mi	1.9K (7.5%)
4	Winter Park Village / 510 Orlando Ave, Winter Park, FL 32789	0.8 mi	1.8K (7.1%)
5	Shops on Park / 200-218 N Park Ave, Winter Park, FL 32789	0.1 mi	1.7K (6.8%)
6	Orlando International Airport / 1 Jeff Fuqua Blvd, Orlando, FL 32827	11.8 mi	1.6K (6.6%)
7	The Mall at Millenia / 4200 Conroy Rd, Orlando, FL 32839	9.2 mi	1.4K (5.8%)
8	Rollins College / 1000 Holt Ave, Winter Park, FL 32789	0.4 mi	1.4K (5.6%)
9	Disney Springs / 1486 Buena Vista Dr, Lake Buena Vista, FL 32830	18.8 mi	1.3K (5.3%)
10	The Alford Inn at Rollins College / 300 E New England Ave, Winter Park, FL 32789	0.2 mi	1.3K (5.1%)

Category: All Categories | Min. Visits: 1
Spring Arts Festival - Mar 18th, 2022 - Mar 20th, 2022
Spring Arts Festival - Mar 19th, 2021 - Mar 21st, 2021
Data provided by Placer Labs Inc. (www.placer.ai)



Length of Stay



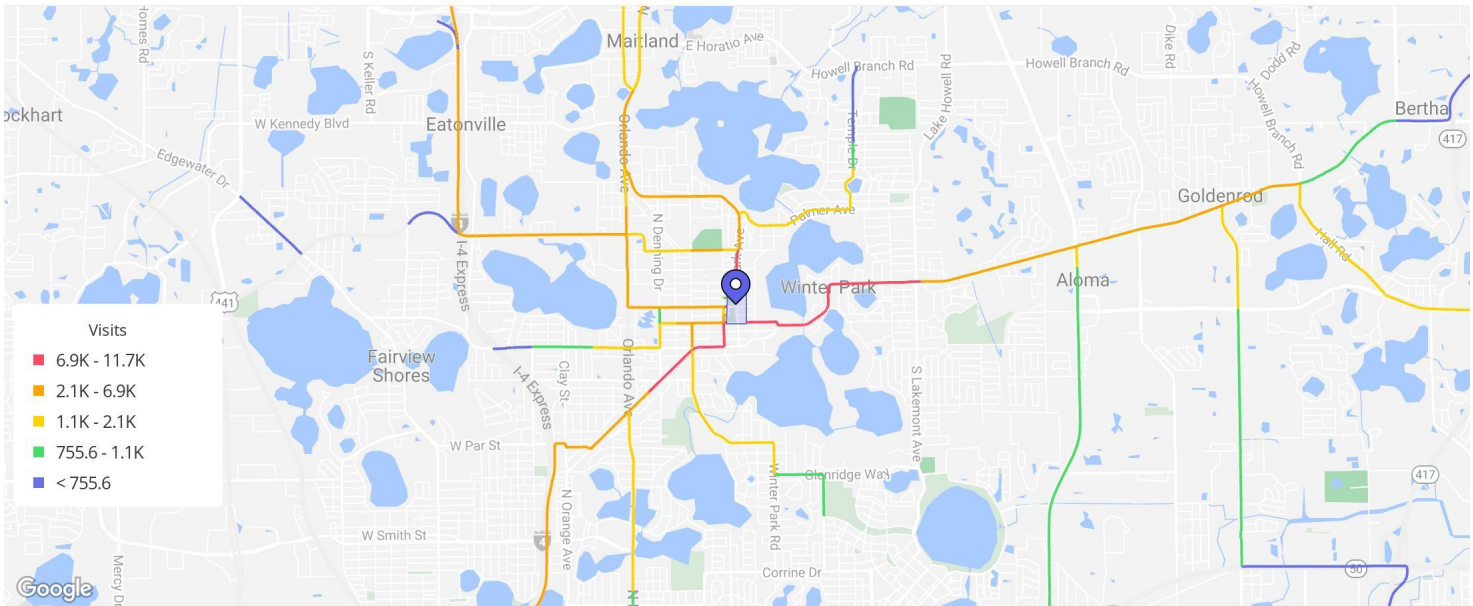
Visits
Spring Arts Festival - Mar 18th, 2022 - Mar 20th, 2022
Spring Arts Festival - Mar 19th, 2021 - Mar 21st, 2021
Data provided by Placer Labs Inc. (www.placer.ai)



Property Overview

Time Compare

Visitor Journey - Routes

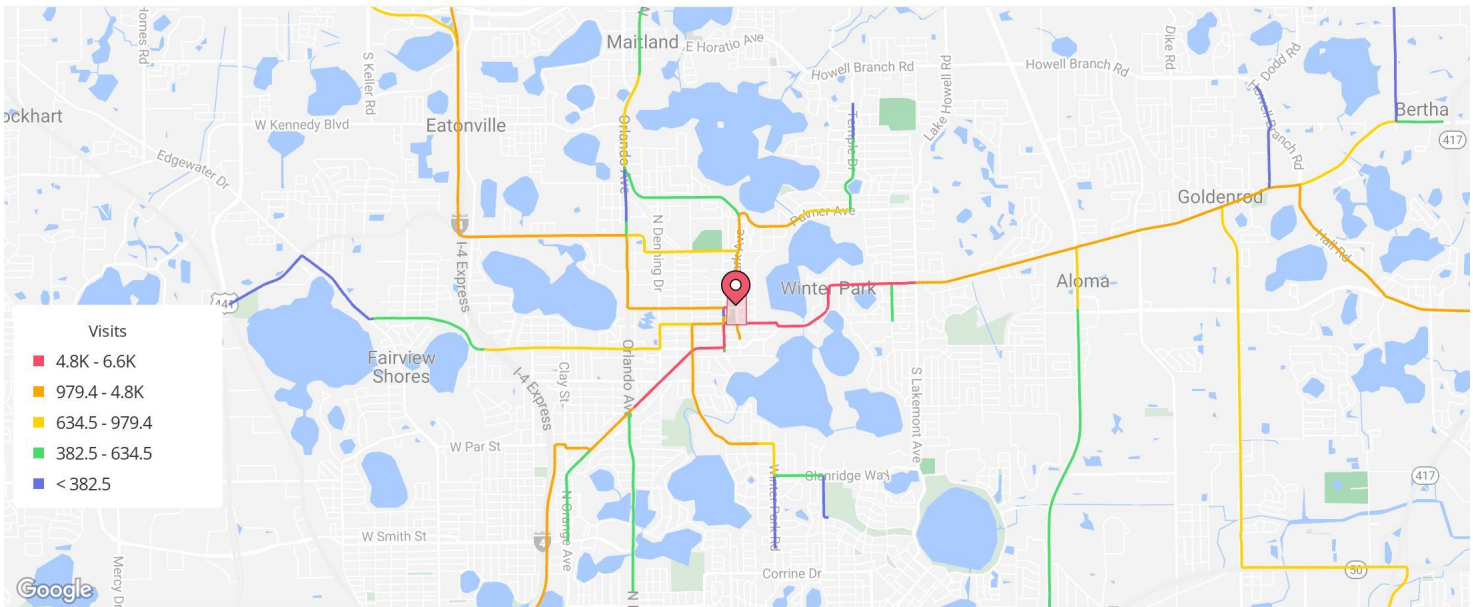


To protect individual privacy, the beginning points shown for each route are approximations and do not represent actual home locations.

Journey Direction: To Property | Mar 18th, 2022 - Mar 20th, 2022
Data provided by Placer Labs Inc. (www.placer.ai)



Visitor Journey - Routes



To protect individual privacy, the beginning points shown for each route are approximations and do not represent actual home locations.

Journey Direction: To Property | Mar 19th, 2021 - Mar 21st, 2021
Data provided by Placer Labs Inc. (www.placer.ai)





Economic Development Advisory Board

agenda item

item type	Staff Updates	meeting date	June 13, 2023
prepared by	Kyle Dudgeon	approved by	
board approval			
strategic objective			

subject

Denning Wifi Project Update

motion / recommendation

N/A

background

At the April 2021 EDAB meeting, the board approved a grant scope for public WiFi on Denning Drive. Staff is providing an update.

alternatives / other considerations

fiscal impact

Grant funding is for \$125,000

ATTACHMENTS:

[CDBG Location Map.pdf](#)



CDBG Location Map

City of Winter Park
Florida

Census Tract 159.01
Block Groups 1 & 3

Legend

 CDBG CensusBlockGroups

