



# Master Plan of the Commercial Tourist District on St. Armands Key

PREPARED FOR THE CITY OF SARASOTA, FLORIDA | DECEMBER 15, 2008



PREPARED BY



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IN ASSOCIATION WITH

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## ACKNOWLEDGEMENTS

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St. Armands Landowners Association

St. Armands Residents Association

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ON ST. ARMANDS KEY

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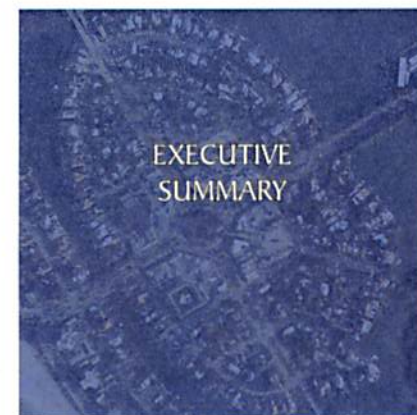
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EXECUTIVE SUMMARY

St. Armands, located within the City of Sarasota, is the result of John Ringling's vision of an upscale shopping and residential district connected to downtown Sarasota via the John Ringling Causeway and today, John Ringling Bridge. From the "boom" era of the 1920's to bust in a very short period of time, St. Armands languished for more than twenty (20) years. But, during the early 1950's, shops re-opened and the "Circle" was once again a vibrant up scale shopping district. The layout remains much the same as the original design with a traffic circle surrounded by shops and restaurants

St. Armands Circle has a long and prestigious history as a premier shopping destination. Recently, however, the Circle has faced significant challenges from a variety of sources. The Circle's age is beginning to show; the quantity and quality of competition has increased; and customer demographics and preferences have changed. Notably, the Circle's primary anchor (the upscale regional department store, Jacobson's) closed in 2002. While its space has been occupied, its function has yet to be replaced. As times have changed, St. Armands Circle has gradually evolved from a destination retail-anchored shopping area to a destination restaurant-anchored entertainment center.

The Circle has seen significant image improvements due to the work of area property owners and merchants; however, sales are still lower than previous years. The St. Armands Business Improvement District (BID) sees a need to develop a Master Plan that can provide an analysis and establish a roadmap to correct some of the immediate and longer-term issues related to parking, connectivity, wayfinding and signage, branding, and imaging through redevelopment, design guidelines and improved aesthetics. The Master Plan of the Commercial Tourist ("CT") District on St. Armands Key is driven by the St. Armands Business Improvement District (BID), St. Armands Circle Association, and the LMR Association (St. Armands Landowners, Merchants and Residents) and is supported by the City of Sarasota.

In May 2008, the Heidt & Associates Project Team was entrusted with the task of producing the Master Plan of the CT (Commercial Tourist) District on St. Armands Key. The project boundary includes the area designated as CT zoning which is essentially the "square" bounded by North Adams Drive, Madison Drive, North Washington Drive

and Monroe Drive, and the "G" (Government) zoning area including the large surface parking lots (South-Aqua and North-Gold Quadrants), and the fire station site.

Although the Master Plan of the CT District of St. Armands Key is focused on the area surrounding the Circle, Chapter 2 – Market Analysis, Chapter 3 – Transportation, Parking, and Circulation, and Chapter 5 – Sense of Place take into account regional issues affecting the Master Plan. The Market Analysis includes economic influences affecting the project area based on travel times, demographics, and investment characteristic. Transportation, Parking, and Circulation and Sense of Place take into consideration connectivity issues related to roads, bridges, waterways, and pedestrian systems. Historic Harding Circle Park, located at the center of the Circle was excluded from the study area.

The goals of the Master Plan are as follows:

- Develop a master plan for the CT (Commercial Tourist) District that defines goals and action strategies for creating, maintaining, and revitalizing an economically viable commercial shopping district, with considerations of compatibility with the surrounding residential area.
- Evaluate current parking needs and capacities, pedestrian and vehicular access to and from parking and the means to meet current and future parking needs and access, with consideration of its impact to the surrounding residential neighborhood.
- Develop estimated costs, funding sources, and a schedule for suggested development improvements.
- Address Development Opportunities for both short-term and long-term revitalization of the District.
- Establish a framework for Design Guideline Standards to allow implementation of new development, renovation and maintenance in a controlled manner and consistent with Ringling's vision.
- Recommend enhancements to vehicular and pedestrian circulation, gateways, medians, streetscapes and signage in an effort to create a Sense of Place.

The Heidt & Associates Project Team conducted two (2) public workshops, several meetings and interviews with special interest groups, citizen groups, and governmental entities including the City of Sarasota, and a question and answer session with the LMR Association. In addition, comments were solicited from patrons, landowners, merchants and residents through questionnaires, preference surveys, and a merchant/landowner survey. Details of the public meetings, including sample surveys and feedback received from citizens can be found in the appendix to this Plan.

This document endeavors to provide an effective and realistic program for implementation of the specific programs, projects and initiatives that will help ensure the long-term success of the Circle. The conclusions and recommendations are based on sound land planning practices and philosophies.

Master Plan Schedule

- City of Sarasota RFP, issued December 2, 2007
- City of Sarasota RFP, submitted January 3, 2008
- City of Sarasota RFP Shortlist, issued January 14, 2008
- City of Sarasota RFP Presentation, February 8, 2008  
Federal Building Boardroom  
111 South Orange Avenue  
Sarasota, Florida
- Kick-off Meeting, May 2, 2008  
Federal Building Conference Room  
111 South Orange Avenue  
Sarasota, Florida
- Workshop # 1, July 23, 2008  
St. Armands Key Lutheran Church  
40 North Adams Drive  
Sarasota, Florida
- Workshop # 2, September 19, 2008  
St. Armands Key Lutheran Church  
40 North Adams Drive  
Sarasota, Florida
- Substantial Completion, October 15, 2008  
Draft Master Plan submitted to City of Sarasota
- LMR Meeting, October 23, 2008  
Review of Draft Master Plan
- Final Completion, December 15, 2008  
Master Plan submitted to City of Sarasota

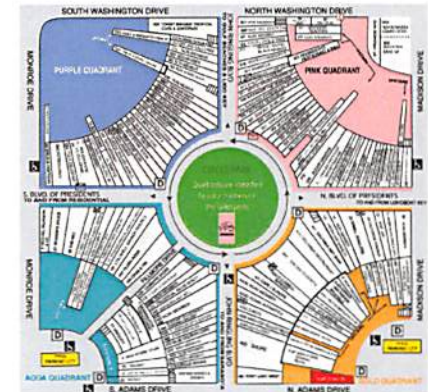
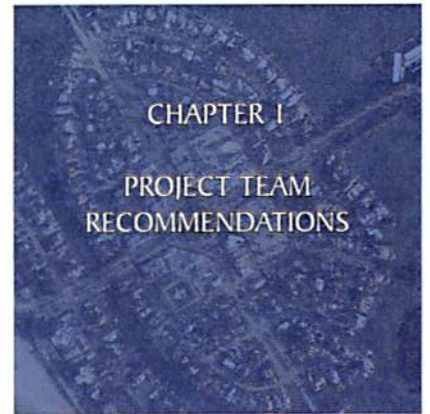


Figure 0-1: St. Armands Circle Association Merchant Map



Figure 0-2: Recent Improvements Constructed at St. Armands Circle



CHAPTER I  
PROJECT TEAM  
RECOMMENDATIONS

OVERVIEW

The recommendations from the Project Team are the result of public meetings, citizen input, economic analysis, and consideration of regulatory and financial constraints. Recommendations address both short-term and long-term revitalization and in several instances contain options within specific recommendations. Each recommendation also takes into account the necessary implementation mechanisms.

The recommendations are divided into distinct categories including Development Opportunities, Transportation, Parking and Circulation, and Sense of Place. More detailed information for each of these categories can be found in the subsequent chapters of this Plan.

DEVELOPMENT OPPORTUNITIES

The Project Team conducted a market analysis that identified the following:

- The closure of Jacobson's, considered the anchor tenant, resulted in the loss of a significant portion of the regional market.
- The high-end condominium market creates a seasonal environment.
- There is a shortage of lodging facilities.
- A "gap analysis" showed an opportunity gap in the following retail areas: department store, grocery store, cosmetics, beauty supply and perfume store, luggage and leather goods store, florist, hobby, toys and games store

Impediments to redevelopment include the lack of available land, the thirty-five (35) foot and forty (40) foot height restriction, multiple ownership of connected structures, and the inability of the Circle Association to enforce restrictions and to assess members.

The Project Team recommends seeking one or all of the following:

- A small upscale national retail department store that would act as an end-destination retail anchor and draw customers from the entire MSA (Metropolitan Statistical Area).
- A boutique hotel. Additional lodging facilities should create an increase in the off-peak seasonal consumer base.
- An Upscale Specialty Grocer, like Whole Foods or Fresh Market. Niche gourmet grocery chains such as Whole Foods or Morton's Market have emerged as prototypical anchors.

A national retail anchor would provide not only a draw of customers from a more regional market, it would also supply additional customers for other retailers. The previous retail anchor drew permanent area residents, often residing at a significant distance to the Circle. With the loss of Jacobson's, the primary anchors are the unique restaurants. However, the market draw is significantly smaller than that of Jacobson's. Without a regional draw, the continued vitality of the Circle is threatened by newer, existing commercial developments and future planned centers that are more modern and offer customer conveniences that may be lacking in St. Armands. It should be noted that such a use might be difficult to develop given the built-out conditions of the Circle and the multiple ownership of connected structures. The available vacant land is currently utilized for surface parking. As discussed below, there is a lack of sufficient parking to support the existing retail uses. If the vacant land were to be developed, it would not only result in a loss of parking but it would create the need for additional parking. One option for redevelopment is to combine structured parking with a retail use on the South (Aqua) Quadrant and utilize the North (Gold) Quadrant, the more challenging to design of the two, for only structured parking. If designed properly, the South Quadrant could support both uses and achieve the goal of providing additional parking for the existing retail uses and an end destination retail anchor. In such a scenario, it would be advantageous to develop the North Quadrant initially in order to offset the loss of parking during construction of the South Quadrant.

On site hotels provide a natural base for retail shopping areas because hotel visitors often have limited local mobility and limited knowledge of the area in which they are staying. The development of a hotel would face the same impediments as the retail anchor in terms of the loss of parking. In addition, the City recently adopted an overlay district within its Comprehensive Plan that limits the building height on the vacant quadrants to thirty-five (35) feet on the South Quadrant and forty (40) feet on the North Quadrant. The North Quadrant faces additional design challenges with respect to its size, an existing structure, and a planned fire station. It may be difficult to design a hotel that will conform to the height limitation as well as meet parking needs on either of these parcels.

In the Retail Gap Analysis that was performed, a food store presented the largest gap for opportunity. When considered strictly in the context of the analysis, an upscale grocer would seem an ideal choice for the Circle. However, when examined more closely, the seasonal nature of the residents as well as the physical arrangement of the land seem to indicate that a grocer may have difficulty succeeding in this location. In addition, the customers of the food store are not complementary to other retail uses (i.e. the trip to the food store is a single and end destination trip).

Conceptual site plans that explore development opportunities for the North (Gold) and South (Aqua) Quadrants are detailed in the Development Opportunities chapter.

TRANSPORTATION, PARKING, AND CIRCULATION

The project team conducted a thorough analysis of transportation issues, prepared an inventory of available parking and assessed the current system of pedestrian circulation.

Transportation

St. Armands Circle absorbs a large amount of through traffic headed to popular destinations in Lido Key and Longboat Key from both Sarasota and Manatee Counties. Unfortunately, improvements to North Boulevard of the Presidents and John Ringling Boulevard are limited by the regulations of the FDOT (Florida Department of Transportation). The current circulation pattern of area roadways lends itself to through trips from downtown Sarasota to Longboat Key. Due to the developed nature of the area, this pattern cannot be altered. While some local drivers avoid the Circle by utilizing local residential streets, this is not an appropriate alternative traffic pattern.

In recent years, there have been studies and recommendations by various agencies for a system of water taxis and/or trolley service to St. Armands Circle. Such ideas could be further studied in the future, however, were not determined to be feasible at this time for the purpose of this plan. A trolley service integrated with proposed water taxi hubs and service routes could stimulate ridership and expand destinations accessible by water taxi. St. Armands Circle is physically situated to serve as the center of routes between proposed hubs.

Given the location of various hotels in the surrounding area, many of these hotels currently provide transportation to and from the Circle for their guests. There is no designated location for shuttle buses or vans to drop off or pick up patrons. Such a space should be provided, similar to the valet station, directly on the Circle in the parallel spaces. One or two spaces should be sufficient and would require appropriate signage.

Many survey respondents highlighted the fact that the valet service is not well utilized either because of its location or lack of visibility. The Project Team recommends that the valet station be relocated near the intersection of North Adams Drive and John Ringling Boulevard so that as patrons enter the Circle, it is an obvious alternative for parking their vehicle.



Figure 1-1: Existing Vehicular and Pedestrian Circulation



Parking

A shortage in parking was highlighted by landowners, merchants, and residents, in the public meetings and through field-surveys. It is recognized by the Project Team as a central issue in the redevelopment and revitalization of St. Armands Circle. There is presently a demand for 1,200 parking spaces to meet weekend demand and 1,500 parking spaces for peak season events. While there are 1,050 parking spaces available to patrons, only 752 of those spaces are within the CT district. These spaces include surface lots, on street parallel parking, and on street angled parking. Outside of the CT district, the remaining 298 spaces are within a one-quarter mile radius from the center of Harding Circle Park, however, built obstructions and actual paths skew the comfortable walking radius.

Short-term solutions to provide additional permanent parking spaces include reconfiguration of travel lanes on roadways and re-striping of existing spaces. Specifically, South Boulevard of the Presidents, between Monroe Drive and South Washington Drive, is presently two lanes in each direction with parallel parking on each side. This area has a low traffic flow, and therefore the number of lanes could be decreased from four to two. This would add space to

accommodate angled parking along the median. Parallel parking would remain on the exterior of the street where residential drives are not present. See Figure 1-3 (bottom right).

The long-term solution to provide additional parking spaces is to provide structured parking on one or both of the South (Aqua) and North (Gold) Quadrants. As discussed above, such a structure could be provided in combination with a retail use thus achieving two goals. The City recently adopted amendments to the Comprehensive Plan, including a height limitation that is applicable to the referenced properties. The South Quadrant will be restricted to thirty-five (35) feet and the North Quadrant will be restricted to forty (40) feet. While this would still allow the addition of structured parking, it would limit the number of spaces that are provided and could also have an impact on the financial feasibility. Through the public involvement process, the North Quadrant was identified as more appropriate for structured parking with the least impact to the surrounding land uses. In addition, the City recognized the site development limitations due to the shape of the land and existing structures and granted an additional five (5) feet in allowable height for this parcel.

	Parallel	Angled	Surface Lot	Totals
Gold	71	0	202 (North)	273
Aqua	76	19	248 (South)	343
Purple	73	32	0	105
Pink	69	16	0	85
Ringling Blvd. Washington to Polk	27	64	0	91
Ringling Blvd. Adams to Washington	29	0	0	29
N. Blvd. of Presidents Madison to N. Washington	37	0	0	37
S. Blvd. of Presidents Monroe to S. Washington	87	0	0	87
<b>Totals</b>	<b>469</b>	<b>131</b>	<b>450</b>	<b>1050</b>

Table 1-1: Available Public Parking by Area and Type

Existing Spaces	Peak Parking Goal Normal <sup>(1)</sup>	Peak Parking Goal Event <sup>(1)</sup>
1,050	1,200	1,500
<b>Deficient</b>	<b>&lt;150&gt;</b>	<b>&lt;450&gt;</b>

<sup>(1)</sup> Assume increase of 10% over May count.

Table 1-2: Parking Goal



Figure 1-2: Available Public Parking Inventory

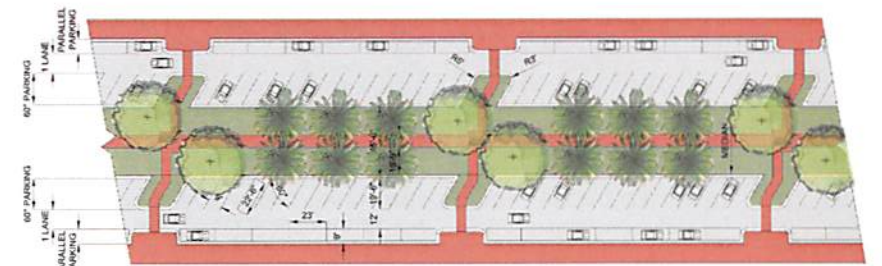


Figure 1-3: Recommendation for Parking along South Boulevard of the Presidents between Washington Drive and Monroe Drive

Circulation

St. Armands Circle businesses rely heavily on foot traffic. Therefore it is essential to the long-term strength of the Circle to employ a pedestrian friendly environment. There is an uninviting and unpleasant pedestrian atmosphere. Pedestrians currently cross at unmarked areas and the walkways are often crowded with furniture and trash receptacles. In addition, St. Armands faces the difficulty of abutment between public parking areas and service alleys.

Several intersections leading to the Circle do not have crosswalks. Crosswalks, as indicated in Figure 1-4, should be added at these intersections to safely funnel pedestrians to their destination. Furthermore, no pedestrian route is provided from many on-street parking spaces. Mid-block crosswalks, median sidewalks, and regularly spaced access

ramps are proposed for pedestrian safety and are discussed in more detail in the median and streetscape concepts below.

St. Armands lacks bicycle amenities. Patrons arriving to the Circle by bicycle must lock bicycles to nearby street furnishings which further impedes pedestrian mobility. It is recommended that, in conjunction with other improvements, bicycle amenities are added to the Circle in order to encourage bicyclists to visit St. Armands and free sidewalks of unnecessary obstacles.

It is recommended that any future Design Guidelines adopted by the Circle Association address the placement of furniture and other obstructions on the sidewalks. It is desirable to have eleven (11) feet minimum sidewalk widths in urban spaces where stores abut walks. St. Armands Circle is limited by available widths, however, a minimum

width of six (6) feet should be maintained where practical. The Project Team has developed Streetscape Concepts, which are discussed below, that should be implemented to further address the utilization and organization of available sidewalk space.

Within the North (Gold) Quadrant, a mid block alley provides pedestrian access from the existing surface lot to the Circle. This alley does not provide a desirable means of pedestrian travel. It is dark and contains several turns thereby inviting potential dangerous activity. This alley could be closed to patrons by a gate at both ends while still allowing controlled merchant access as necessary. Since the alley is in close proximity to the corner, and the alternate point of access, closure of the route would not cause a major inconvenience and could stimulate visibility for corner shops.

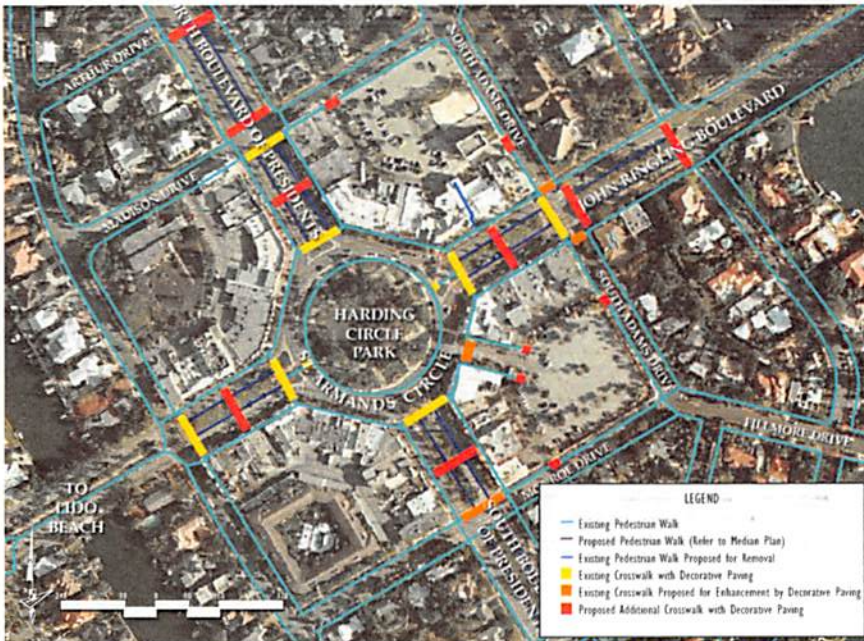


Figure 1-4: Proposed Pedestrian Circulation Improvements



Figure 1-5: Existing Mid-Block Pedestrian Alley Proposed for Closure to Public

The relationship between the service alleys and the surface parking areas creates an unpleasant experience along paths connecting to the storefronts. The service alleys function as a part of the surface parking lots. Patrons utilizing these parking areas are subjected to pedestrian interaction with delivery vehicles, the visual and sensory impact of dumpsters, and other uninviting activities. To enhance the pedestrian experience, the Project Team has developed an Alley and Surface Parking Improvement Concept Plan, depicted in Figures 1-9 through 1-13 (right), that can be implemented and significantly improve these areas. The implementation of this Concept would result in the loss of some parking spaces; however, it significantly benefits the surface parking areas in terms of both function and image. The concept suggests reconfiguration of spaces to add buffering between the service drive and main parking area. It also incorporates a walk to direct pedestrians to points of access. Specific details of this plan can be found in the chapter on Transportation, Parking and Circulation. If it is determined that structured parking will not be implemented or cannot be implemented in a short period of time, the Project Team believes it is critical to incorporate the Alley and Surface Parking Improvements in the initial phase of revitalization. If structured parking is established, the facility itself will provide the necessary separation and buffering between these incompatible functions.



Figure 1-9: Alley Improvement Concept Plan



Figure 1-6: Existing Service Entrance



Figure 1-7: Existing Trash Disposal



Figure 1-10: Alley Improvement Pedestrian Access Point Conceptual Elevation



Figure 1-8: Existing Service Alley



Figure 1-11: Alley Improvement Pedestrian Access Conceptual Elevation Alternative



Figure 1-12: Surface Parking Improvement Concept Plan, North (Gold) Quadrant



Figure 1-13: Surface Parking Improvement Concept Plan, South (Aqua) Quadrant



Figure 1-14. Proposed Improvements for Sense of Place

**SENSE OF PLACE**

The goal of improvements to St. Armands is to create a Sense of Place and identity that allows recognition and recall of the Circle as distinct from other places. The wayfinding system currently in place needs consideration to aesthetic treatment, prominence, and locations to establish a clear hierarchy. The Project Team has prepared concepts for Median Enhancements, Gateways, Signage modifications as well as Streetscape Treatments. These concepts are presented in additional detail within the Sense of Place chapter.

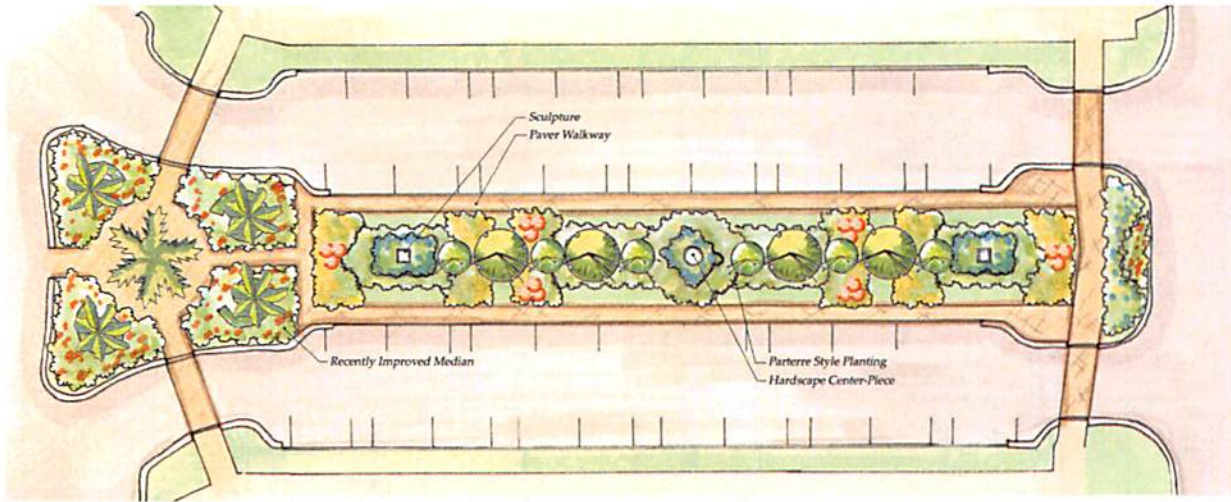


Figure 1-15: Median Concept A

**Medians**

Two Median concepts are proposed for consideration which are representative of distinct styles; a "parterre", or more formal garden area, inspired by Mable Ringling's Rose Garden and another which is an enhanced arrangement of the well-known image of St. Armands utilizing lush, tropical plantings. These concepts would require an equal initial investment, however, the less formal concept may have a lower maintenance cost.

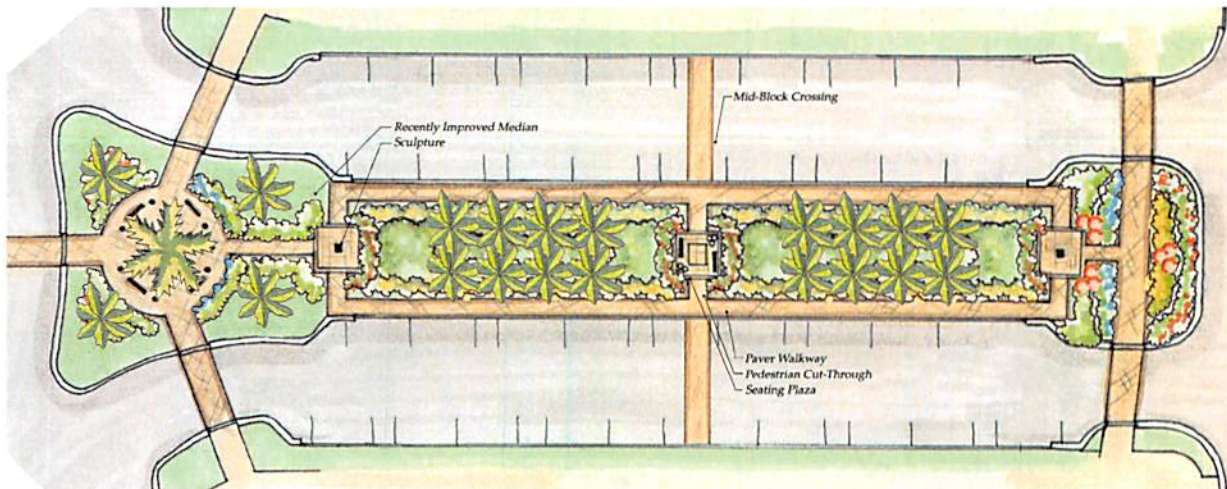


Figure 1-16: Median Concept B

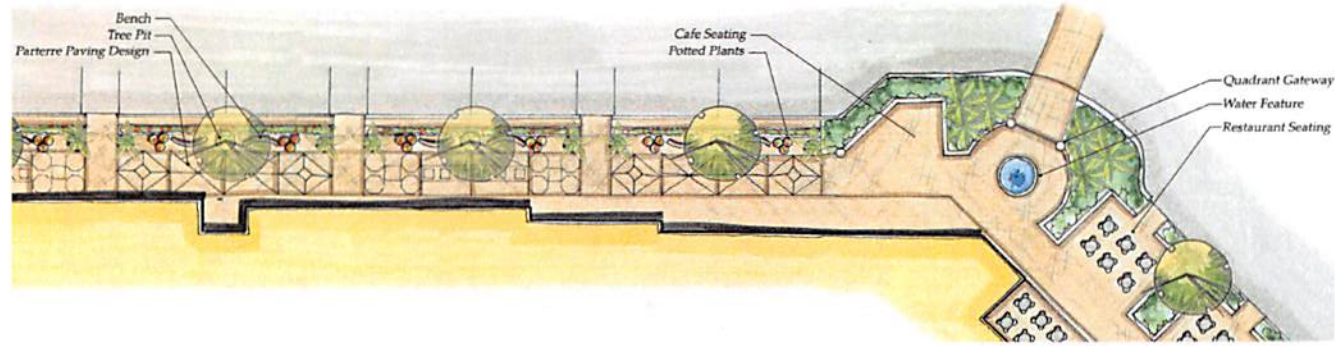


Figure 1-17: Streetscape Concept A

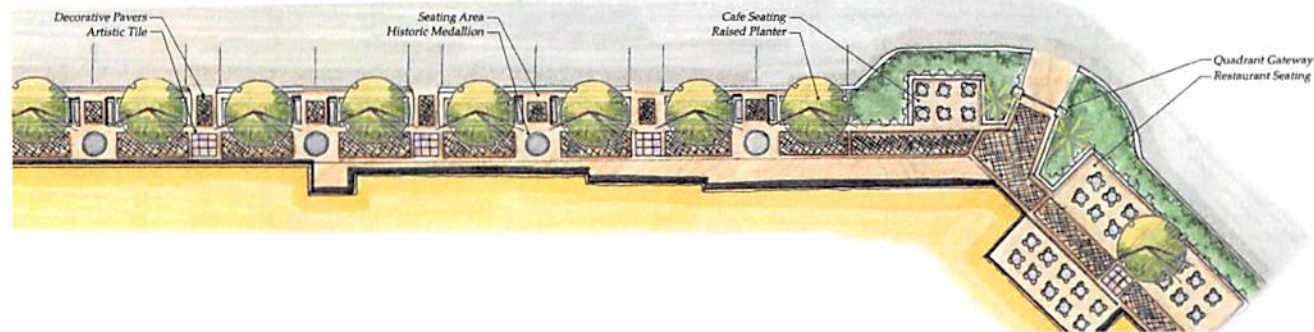


Figure 1-18 Streetscape Concept B

**Streetscape**

Two Streetscape concepts are presented for consideration, which would be paired with the median concepts, with one concept being more formal than the alternative. The streetscapes should be divided into three zones, containing specific elements that contribute to the function of circulation, site furnishings, and outdoor dining (where present). To further complement the Streetscape concepts, selection of site furnishings will enhance St. Armands identity and will connect quadrants through common elements. Three concepts for furnishings are presented in the Sense of Place chapter and include modern elements, traditional elements or artistic elements. As a part of future Design Guidelines, a standard for site furnishings should be adopted. Consistency in street lighting, waste receptacles, seating, newsstands, bicycle racks and raised planters will offer a more unified theme.



Figure 1-19: Concept for Existing Gateway Enhancement at John Ringling Boulevard



Figure 1-20: Concept for Existing Gateway Enhancement at South Boulevard of the Presidents

Gateway

Enhancement of existing Gateway monuments will establish an immediate image for St. Armands Circle. As an initial consideration, two Gateways are proposed; along John Ringling Boulevard at the intersection of Washington Drive and along North Boulevard of the Presidents at the intersection of Adams Drive. Implementation of such enhancements should precede the more vast undertaking of the full median enhancement which will require the burial of the overhead utility lines and curbing of the roadways. The initial work will be fruitful and will eventually be a part of the median enhancement. The overhead utility lines visually clutter the approach to the Circle and the desire to bury them was identified as a priority concern in the public involvement process. The combination of the overhead lines and the typical section of the roadway limit the ability to add the desired gateway and enhance and beautify the medians.



Figure 1-21: Proposed Gateway Conceptual Elevation

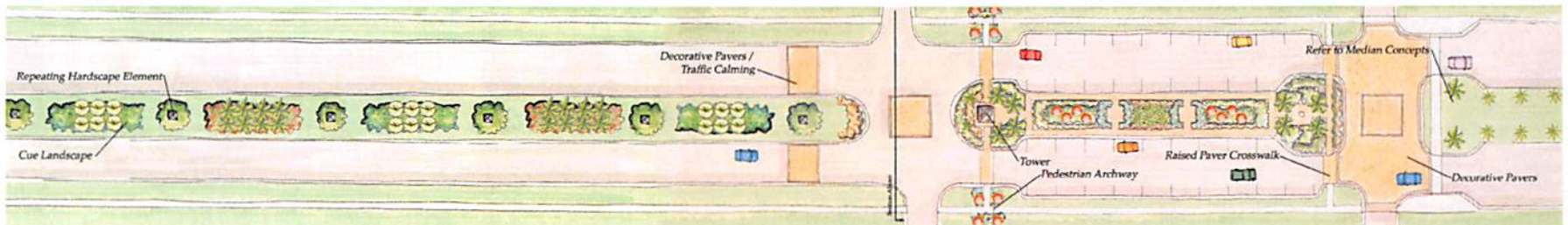


Figure 1-22: Proposed Gateway Conceptual Plan



Figure 1-25: Proposed Directional Signage

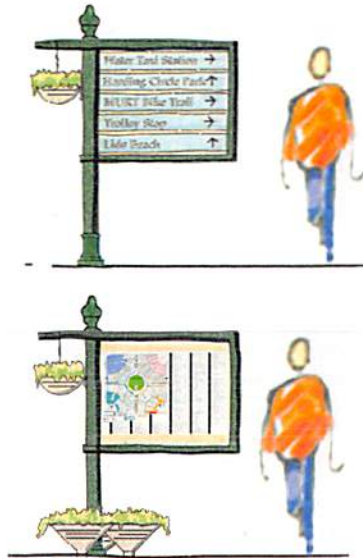


Figure 1-26: Proposed Pedestrian Directory



Figure 1-27: Proposed Street Signage Enhancement

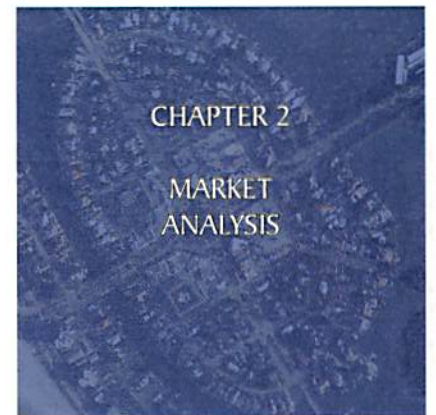
### Non-Regulatory Signage

The abundance and frequency of existing directional signage provides an overload of information for a driver entering and passing through St. Armands. This situation reduces the effectiveness of signage, especially for drivers facing distractions of a pedestrian oriented environment. Fewer sources of information in a more prominent format are proposed. Signs with multi-panels would consolidate sources of information and assist drivers in understanding the layout of St. Armands. In addition, directories should be located along pedestrian paths and at each entrance to the Circle from parking areas. There are some limitations imposed by the regulations of the FDOT, however, standard street signs may be aesthetically improved by adding decorative posts and bases.

### Quadrant Individuality

The four quadrants of the Circle are commonly identified by color-coding on directory maps and are further enhanced with color-coded banners that garnish the streetlights. The quadrants differ through architecture, landscape and hardscape treatments and also offer different spatial relationships in terms of scale and massing. The current method of conveying the colors, on signage and banners, is often visually impaired to both pedestrians and drivers. The colors should be more prominently displayed. One way to achieve a continuous pedestrian corridor throughout the various quadrants would be with consistent concrete finished and paver patterns. While it is not the goal to achieve homogeneity among the quadrants, the different characteristics can be distracting. It is recommended that the adopted Design Guidelines address the need for commonality in the varying quadrants. The chapter on Design Guidelines provides direction on ways to achieve this goal.





CHAPTER 2

MARKET  
ANALYSIS

**OVERVIEW**

The primary strength of St. Armands Circle is its history and brand recognition. The Circle is a famous shopping area with very strong name recognition, locally, regionally, nationally, and even internationally. The primary weakness is ineffective parking, lack of adequate wayfinding, missing "anchor", and fading image.

The Jacobson's department store, that once anchored the Circle, was truly an end destination retail establishment that drew its customers from the entire MSA (Metropolitan Statistical Area). Much like a department store in a regional mall, Jacobson's acted as the primary retail draw but once in the Circle, Jacobson's customers also visited the "other tenants" which (in the case of a mall) are referred to as B tenants. These B tenants included the restaurants. With Jacobson's closure, the Circle lost a significant portion of the regional market.

As it evolved, the restaurants have taken on the function of an anchor (albeit smaller geographic market). The Circle still maintains a significant "upper end" brand image for good food and unique shops. It is well positioned to capture the upscale customer base of Longboat and Lido Keys. The construction of the new causeway has strengthened the Circle's marketing draw for the newly constructed condominiums that now surround downtown Sarasota, and to a lesser degree the 10-mile radius geographic market.

Based on surveys conducted by the Project Team, the merchant's association, and the BID, the Circle draws traffic from the greater region during special events, but is strongly dependent on the seasonal market of the Keys and Sarasota as a whole. The condominium market of Lido and Longboat Keys are significantly seasonal (winter) and the winter season is by far the high season for the Circle. What is unique is that due to the high cost of condominiums and their furnishings, most are not available to the non-seasonal rental market. Furthermore, the hospitality market of Sarasota County and specifically Lido and Longboat Keys is limited; further limiting the growth of the non-seasonal market.

The Circle has approximately 400,000 square feet of space including traditional small independent retailers, restaurants, and offices. Approximately 250,000 square feet are devoted to retail/restaurants, which is considered

large. The mix of retail use is good but there seems to be a question of whether the Circle is to maintain its "higher-end" image or add more middle-income retailers. According to surveys, most retailers and property owners perceive that the Circle does not strongly compete with the area's other retail centers due to its brand and location. Moving to a more price conscious retail model would open the area up to more competition from other regional retailers, especially the emerging Commercial Business District (CBD).

**DESTINATION RETAIL & ENTERTAINMENT CENTERS**

The most successful retail areas in today's markets are "destinations." The difference between a "destination environment" and a set of stores is not drastic, nor well defined. A normal retail area includes a set of businesses that fulfill basic needs but are not particularly special. A destination could include those same stores, but it offers something more than just a set of stores, it offers special, all-day attractions, a wide variety of benefits and a desirable environment that creates a strong sense of place. It becomes more than the sum of its parts and becomes a destination in itself. According to the ULI, well-planned destinations draw from a radius of 30 miles despite their small size in comparison to the typical, 15-mile market radius for a regional mall.

Destination environments vary widely, but all share the same three critical components of any successful retail operation. Those three components are often called by many different names and terms, for this report we will use the following, simpler, broader terms:

1. Attraction  
*a.k.a. Market Capture, Draw, Traffic Generation, Anchoring*
2. Convenience  
*a.k.a. Wayfinding, Accessibility, Parking, Proximity*
3. Environment  
*a.k.a. Atmosphere, Place, Appearance, Ambiance*

There are often trade-offs to be made between these three elements; though not always. Areas thrive if they find a way to successfully provide all three (3) components. They are often cross-complimentary, so investing in one helps provide for others as well. For example, the right mix of merchants can act as an attraction, make a visit more

convenient for consumers and positively contribute to the environment of the retail destination (for more on retail mix, see Figure 2-4 on page 2-4).

**Attraction**  
*a.k.a. Market Capture, Draw, Traffic Generation, Anchoring*

A basic question when assessing retail is how to get people to come to your retail area. Attraction is simply a matter of providing potential customers with good reasons to do so. Something must 'draw' them in and 'capture' their attention; otherwise, consumers will not come. The nature of the attraction itself is not necessarily important to many of the retailers in the area. The goal is to get potential consumers there. Once they are there, they are far more likely to make retail purchases.

There are a variety of attractors, the simplest, most recognized, and most often used are large establishments that serve as anchors. Larger destinations have been using multiplex or performing art theaters as anchors, along with nightclubs and restaurants. Large department stores anchor other successful retail areas. In the mixed-use retail arena, upscale grocery stores have emerged as prototypical anchors. Many smaller areas cannot support very large anchors and need some other way to attract visitors. In some places, the shops and/or environs themselves and their unusual merchandise mix are the magnet that attracts customers. Creatively served food, specialty retail, and the atmosphere of entertainment become drawing cards. Smaller retail destinations also sometimes include community amenities such as public plazas that are used for public functions, including high school graduations and weddings. Table 2-1 (following page) shows examples of retail anchors and attractors in a number of different categories.

Another critical part of attraction is the duration of it. Successful retail destinations provide all-day attraction for consumers. Most retail shops are open during the day, supported by delicatessens, restaurants serving lunch, and sometimes family and children oriented events. In the evening, many retail shops remain open (particularly those that cater to late-night clientele). They are then supported by entertainment, dinner restaurants, bars, nightclubs, theaters, live music and special events. These elements create an evening-hours draw for customers. On the weekends, special sales, festivals, shows, concerts and other special events complement the all-day attraction.

Special events are a great way to attract potential customers to a retail area. When planning and considering events, it should be noted that certain types of events draw certain types of clientele. While some retail areas would be pleased to have any type of clientele, other areas may cater to a specific type of clientele and prefer to attract only that type of crowd. For instance, a country music festival may not solicit (draw) the desired clientele to an up-scale shopping area. It may, in fact, do more harm than good by taking up valuable parking space and otherwise drive away valued customers. Table 2-2 (following page) lists several examples of typical events at upscale destination centers.

Providing a wide variety of attractions and providing them all day long (and into the night) adds complimentary benefits that will lure more consumers to the retail area. Meeting multiple consumer needs (or wants) in one place, on one day helps to provide another critical component of successful retail, i.e. convenience.

**Convenience**  
*a.k.a. Wayfinding, Parking, Accessibility, Proximity*

Time and effort are valuable commodities to American consumers. Convenience is a means to minimize the time and effort required by consumers to fulfill their needs and wants. It is a combination of ease of fulfillment and accessibility.

Overall, convenience is generally most important to consumers. The retail site that fulfills the most needs and wants for the consumer on each trip will generally be preferred sites that offer less (i.e. the shop with the highest perceived value given for the amount of time spent getting there). In other words, if a consumer can satisfy many needs with one trip, even if the trip is longer, the consumer will make the trip because the "utility" of the experience is perceived to be higher. This is the strategy pursued by a regional mall or the newer "lifestyle centers" that include a wide variety of shops, as well as food and entertainment, in order to increase the perceived benefit to the consumer for the cost of the trip. Another example of this utility is when the quality, type of goods, or pricing is simply unavailable elsewhere; thus, making the perceived value of the goods or experience more important than the cost of getting there. An example of this is a high-quality restaurant that may be located in an out-of-the-way place but still attracts customers from miles away. That being said, accessibility is still an important part of convenience.

Good accessibility is always at the top of the list of requirements for successful retailing. Developers and retailers all agree that it is crucial to provide convenient, inexpensive, and secure access in retail areas. A site with fast access to the most people will be preferred over a site with poorer access. For very high-frequency shopping trips, the closest or the most convenient shop to the consumer is more likely to gain the sales. This is the retail strategy of convenience markets, where price of goods is a secondary consideration. With lower-frequency shopping trips, accessibility is not the main focus, but it is still very important.

Thus, accessibility and fulfillment can create trade-off situations (if one is relatively negative) or they can be complementary (if both are relatively positive). A lack of either accessibility or fulfillment can tip the balance in a consumer's decision-making to a different location. For instance, if a consumer needs milk and a variety of other groceries, they are likely to bypass the local convenience store on their way to the supermarket. The convenience store has a supply of milk, is far more convenient, but will not fulfill all the consumer's needs. The supermarket may be less convenient in terms of distance, but the fulfillment it offers outweighs its proximal inconvenience.<sup>4</sup>

Accessibility involves all aspects of customers arriving at the retail destination. During site selection, proximity to target markets is obviously important. After a site has been established, wayfinding and automotive convenience take precedence. Wayfinding starts well outside of a site with good and informative media. This includes yellow page listings, billboards, websites, brochures, magazines, and mailings. All of this media should make clear where the site is, how to get there, and how to arrive (e.g. "free parking"). Nearer to the retail area, off site directional signage is quite helpful. Approaching the retail area, directional and informative street signage for parking is a necessity if the parking situation is not obvious.

While important, automotive access is not entirely sufficient to provide good accessibility. The importance of automobile access and parking depends on the transportation context of a particular project and on the nature of the retailing and the market served. Furthermore, accessibility should not be confused with parking (though it often is). Accessibility involves all aspects of customers arriving at the retail destination. Parking involves mostly finding a place to put automobiles. By focusing on

parking and ignoring the other elements of accessibility, the human element (i.e. the customer) is removed from the equation. Accessibility problems are often incorrectly defined as insufficient & inconvenient parking. That may be part of any given accessibility problem, but it is certainly not the whole of it. By defining the problem so narrowly, the perceived best solution quickly becomes the maximization of parking spaces and the minimization of parking proximity. Unfortunately, abundant, close parking does not solve all accessibility problems. That being said, in most American retail environments, adequate and convenient parking is a necessity.

Driving is the most common way that American consumers arrive at retail destinations. Therefore, adequate and convenient parking is a major part of accessibility and a major part of convenience. For destinations that draw large populations, either vast sprawling lots, or large parking structures are often the best solution. Parking structures are usually preferred when the cost of additional land exceeds the cost of building a structure.

However, adequate and convenient does not necessarily mean abundant and close. While proximity and abundance often supply adequateness and convenience, they are not the only means for doing so. There are many other factors to consider that affect the convenience of access to the retail destination. Ingress, egress, and traffic, for instance, are three moving issues that have a major impact on convenience, but are often overlooked. For large lots, walking distance is often a primary concern. Trolleys can be used to add convenience. For parking structures, moving issues are paramount as is the ease of finding a parking spot (at arrival and departure). Smart design, color coding, lighting and technology can all be used to make parking in a structure more convenient.

It should also be remembered that parking lots are part of the overall destination experience. Lots are the most commonly overlooked part of the destination environment.

**Examples of Retail Anchors and Attractors**

Large Stores	Entertainment	Natural
Department Stores	Movie Theaters	Beaches
Grocery Stores	Performing Arts	Gardens
Big-Box Stores	Live Music	Landscaping
Civic	Nightlife	Unique
Public Squares	Bars	Mix of Merchants
Parks	Nightclubs	Architecture
Amphitheaters	Restaurants	Special Food Outlets

Source: The Strategic Planning Group, Inc. 2008

Table 2-1: Examples of Retail Anchors and Attractors

**Examples of Events at Destination Centers**

Arts	Music	Food & Wine
Art Week	Music Festivals	Farmer's Market
Art Feast	Lunch & Jazz	Taste of Tampa
Art Mixer	Jazz on Las Olas	Wine Tour
Art Walk	Concerts	Connoisseurs Auction
Art Festival	Regular Live Music	Wine & Food Festivals
Fine Art Festival		
Craft Festival	Water	
	Boat Tours	
	Canoe Race	Holidays
Historical Tours	Air & Sea Show	Parades
Bike Week		Parade of Roses
Pooch-a-Palooza	Sales	Bunny Bonanza day
Outdoor Cinema	Sidewalk Sale	Christmas Events
Fordfest	Book Sales	Holiday Promenade
Monthly Events	Fashion Walk	Celebration of Lights
Regular Events	Fashion Week	

Source: The Strategic Planning Group, Inc. 2008

Table 2-2: Examples of Events at Destination Centers

**Elements That Contribute to Great Environments**

Comfort	Beauty	Safety	Emotions	Entertainment
Benches	Landscaping	Crosswalks	Lighting	Live Music
Shade Trees	Signage	Limited Autos	Music	Street Performers
Heat	Design	Call Boxes	"Place"	Chess Sets
A/C	Storefronts	Uniforms	Architecture	Playgrounds

Source: Strategic Planning Group, Inc. 2008

Table 2-3: Elements that Contribute to a Great Environment

**Environment**

*a.k.a. Place, Appearance, Ambiance, Atmosphere*

Once customers have arrived at the retail destination, the next best question is how to keep them from leaving. The best way to keep customers from leaving is to give them no reason to do so by creating excellent enjoyable environments.

Most people leave places because it is more desirable to be somewhere else. It is more desirable to be somewhere else because that other place fulfills some set of needs and wants that the current environment cannot. This of course depends on individual's personal preferences. Some people may prefer a more comfortable environment while others may prefer a more exciting environment. The extent to which an overall environment can meet the needs and wants of all individuals throughout the day is the best indication of a good environment.

When expressed this way, environment may sound too similar to convenience; it must be remembered though, that consumers have many distinct sets of needs and wants. Some are utilitarian, task oriented needs and wants (which are related to convenience), and others are more esoteric and personal needs and wants (which are related to environment). Environmental wants have more to do with our senses and our emotions and less to do with things and tasks. The commercial difference is that environmental needs and wants are met for free (outside of charging admission). A pleasant environment entices customers to stay. In this sense, the environment becomes much like other give-away marketing tools (e.g. free samples, coupons, 30-day free trials). The hope is that the give-away will generate more profit than cost.

Environment involves everything that we experience as humans: sights, sounds, smells, textures, tastes, emotions and even spirituality. Thus our environmental needs and wants are things like comfort, beauty, safety, good music, and pleasant smells. These things and many more combine to create strong emotional environs like ambiance, feel and atmosphere. Positive emotional environs create positive emotional experiences, which tend to both prolong visits and increase their frequency. When creating environments engineering, architecture, and design should carefully consider all of the elements that create environments. This includes heat, cold, shade, wind, lighting, safety, signage, landscaping, weather, and many other elements. One of

the main benefits to investing in environment is that the investments are complementary. The result - a positive emotional experience - turns out to be more than the sum of its parts - a variety of design elements.

Individual retailers have long been catering to environmental needs and wants. Some do so almost directly; Lay-Z-Boy's primarily sells comfort; art galleries sell beauty; and music stores sell emotions. Other retailers offer environments as giveaways; bookstores include comfortable furnishings and relaxed loitering places; restaurants include candlelight and wall art; hip clothing stores play hip music. The strategy is to produce a pleasant, desirable environment, even a positive emotional experience that the consumer will associate with the store. By doing so, consumers will stay longer and return more often.

The same principles apply to overall retail areas as well. Creating great environments produces positive emotional experiences, which both prolong visits and increase their frequency. Increased exposure leads to increased conversions, which means "equates to profit." For a retail area, shade trees and benches help create comfort; landscaping, signage and design help create beauty; music adds to the emotional appeal; lighting (particularly at night) can add excitement; and removal of dangerous streets adds safety. Chess sets, live music, and street performers add entertainment value; special events add emotional value. All of these things combine to create environments that produce positive emotional experiences. Table 2-3 (previous page) lists several elements that contribute to great environments.

Sense of Place is an often overlooked aspect of great retail areas. There is something desirable about being in a retail area that feels like a unique and distinct place. In order to create this sense of place, well defined entrances and exits are essential; so are distinct and uniform design elements such as street signs, lights, sidewalks and other amenities. Fractured, non-uniformly designed retail areas often end up feeling like a jilted amalgamation of shops rather than a unique and distinct place. This sense of place is a strong contributor to the emotional response of consumers.

It should also be remembered that the environment of a retail area extends beyond just a set of storefronts surrounding a street or plaza. While that may be the focal point of the environment, it is not the entirety of it. The environment of any given place extends as far out as the

customer's emotional response to that place. This includes parking lots and structures, public bathrooms, trolleys, customer service areas, and security offices. Such spaces are often overlooked. When they are, consumers end up having a disjointed emotional response; they may love one area but feel very uncomfortable in others. Every area that is or could be part of a consumer's overall experience should be considered just as important as the focal point of the retail area.

This does not mean that parking garages should be just as ornate as Main Street. It does mean that they should not be ignored. Often simple, inexpensive investments can dramatically improve the environment of these forgotten spaces. Lighting, painting, cameras, signage and emergency call boxes all vastly improve a customer's sense of security in a parking garage. A decent paint job, wall art and removal of janitorial supplies can vastly improve the environment of a hallway that may be used to access bathrooms or a customer service area. These simple fixes ensure that the customer's overall experience is a positive one.

A last space that is also often neglected is the digital space that a retail area occupies. In today's digital world, the appearance, feel and overall environment of any given place can easily be projected beyond its physical boundaries. This principle has long been incorporated into print and television media and is being perfected on the internet. Increasingly, the first place that consumers go to gather information is to the internet (particularly among wealthier and younger Americans). Thus, a website is often and increasingly the first impression potential consumers get. A website is not only a means of conveying information to potential consumers, but a projection of the environment, appearance, emotion, look and sound of a person, place, thing or idea (including businesses). Particularly in the minds of young people, the quality of a business' website is highly indicative of the quality of the business. The best way to think of a website is as a physical extension of the business itself; A business' digital real estate should be built, beautified and maintained with the same quality and care as physical real estate. A beautiful, attractive, informative storefront is just as important in the digital world as it is in the physical world.

A review of comparable shopping areas reveals a variety in the quality of websites. However, several of the shopping areas studied had excellent websites as a digital companion to their physical infrastructure. The best websites included many of the following features:

- Beautiful Graphics, Layout and Design
- Easy, Simple, Elegant Navigation
- Links to Each Store's Individual Website
- An Easy To Search Directory
- A Large Number of Professional Photographs
- Stylized, Rendered & Interactive Maps
- Virtual Tours & Photo Galleries
- Historical Section – Including Photos
- An Up-to-Date Calendar of Events
- Classy, Appropriate Music

End destination retail areas that find an excellent way to provide attraction, convenience and environment are usually very successful. Thus, they each share many of the same characteristics. However, each end destination is different. Variety in objectives, history, demographics, infrastructure and many other factors cause each end destination to take on a uniqueness of its own producing a nuanced variety of end destinations. That being said, end destinations can be broadly and loosely classified into at least two categories: Shopping Destinations (also known as Lifestyle Areas), and Cultural Destination (often referred to as Entertainment Centers).

Shopping Destinations (Lifestyle Areas)

As the name suggests, the main focus in a shopping destination is shopping—particularly very high-end, up-scale shopping. Examples of famous and comparable shopping areas include Worth Avenue in Palm Beach, Paseo Colorado in Pasadena and The Village on Venetian Bay in Naples. Shopping destinations usually include nationally well-known name brands that have a very limited number of direct retail outlets. In such areas, the main attraction is usually the unique and otherwise unavailable mix of up-scale retailers. Convenience is provided in the fulfillment of many up-scale retail wants in one place, on one trip. Environments in shopping destinations must match the quality of the goods being sold. Finely manicured landscaping, well maintained and beautiful facades and sidewalks reflect and project the quality of the shopping experience onto the street.

In addition to the myriad of women's clothing and accessory stores, a number of store-types tend to surface again and again at shopping destinations: children's boutiques, pet specialty stores and boutiques, wine specialty shops, fine art galleries, and florists. This is presumably because the wealthy clientele that frequent shopping destinations often spend large amounts of money on their children, pets, fine wine, fine art and flowers (among other things); enough that such stores can be profitable, even with relatively higher rents.

Shopping destinations are typically populated by older, very wealthy women. Stores adapt their offerings to serve this clientele or even locate in such areas specifically for that clientele. Such areas are usually most busy during the day and typically do not include nearly as much evening attraction as cultural destinations.

Cultural Destinations (Entertainment Centers)

Cultural Destinations focus less on shopping and more on entertainment. They create environments that engage consumers and entice them to become part of the environment. The more successful developments create a sense of community with attractive pedestrian ways, public space & plazas, outdoor café seating, and distinct façade design. They have more restaurants than is typical, along with a higher proportion of leisure activities.

The attraction at a cultural destination is often provided by multiplex theaters, performing arts centers, restaurants, live music, public squares and special food outlets. Convenience is provided by offering the fulfillment of many different types of needs and wants throughout the day. Entertainment, shopping, food, "hang-out time", and even work can all be experienced in one trip to a cultural destination. Aside from being beautiful, comfortable and interesting, the environment of a cultural destination is best when it offers a sense of connectivity and community to the consumer, regardless of his or her vantage point. Café patrons, shoppers, moviegoers and coffee drinkers should all feel like they are connected to and part of the community and cultural experience of being at "the destination"—so much so that even the name of the destination evokes a pleasant emotional response. This is accomplished in large part by attractive pedestrian walkways, public space and plazas, outdoor café seating, distinct façade design for each storefront, and a mix of local businesses and chain anchors.

Cultural destinations still include large amounts of shopping, but they have a much higher proportion of relaxed, or "hang out" retailers such as coffee & tea houses, bookstores, music & electronics and restaurants with ample outdoor seating. Also, a large proportion of cultural destinations are now including Wi-Fi Hot Spots for wireless internet connectivity. Such locations are often "hang-outs" for young people, artists, students, meal-time professionals and office-less professionals. Internet connectivity adds entertainment and productivity value. Relaxed retailers provide low-pressure, comfortable, community environments. Many coffee & tea shops are even designed to produce a "living-room" feel.

The large restaurants included in cultural destinations are often "destination restaurants" themselves. Destination restaurants which tend to locate in areas that have attributes

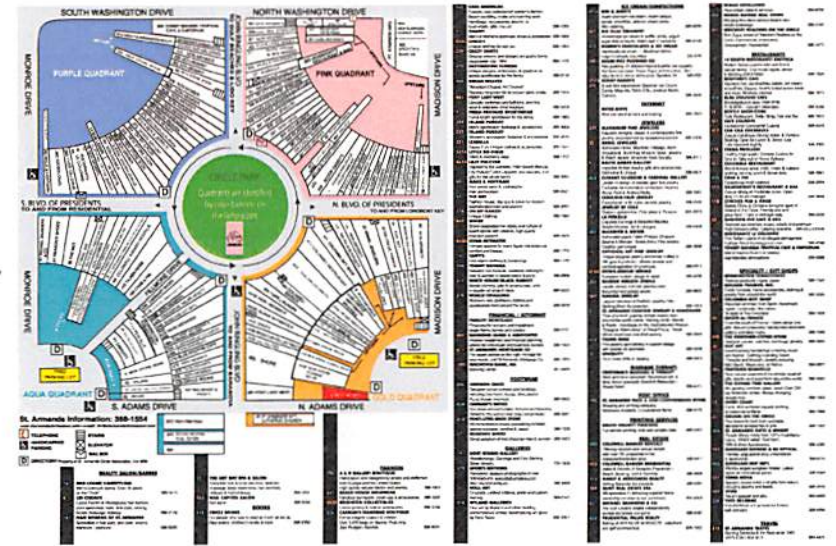


Figure 2-1: St. Armands Circle Association Merchant Map

that seem to make the trip worthwhile, such as water frontage, historical areas or cultural ambience where local market support may not matter at all.<sup>5</sup> Sometimes this cultural ambience is provided by the cultural destination itself, and sometimes the destination and the restaurants share the attractive attribute. In either case, the presence of each is complementary to the other.

Cultural destinations are typically populated by families, teens and young professionals. Stores adapt their offerings to serve this clientele. Traffic is much higher at a cultural destination, but the conversion rate is much lower. Such areas are usually most busy during the evening and typically include many evening attractions. However, there are some destinations that are very successful in serving as a shopping destination during the day and a cultural destination at night. Such a development profits from many of the benefits of mixed-use development (e.g. shared parking & infrastructure, increased security & safety).

Retail Mix of Merchants

Obviously having the right mix of merchants is very important for shopping destinations and cultural destinations. It is actually very important for all retail areas. The right mix of merchants can act as an attraction, make a visit more convenient for consumers and positively contribute to the environment of the retail destination. The wrong mix however, can be highly detrimental to the environment, repel profitable customers and spoil good reputations. What makes a mix "right" or "wrong" depends on the objectives and the target market of a given retail area. A retail area in a rural market may do well to include a pig supply store, a dive bar and a belt buckle outlet. The same stores at an upscale shopping destination could prove to be repulsive. Likewise a broad variety of store-types would be a detriment to a specialty-specific retail area while it would be a strong attribute of a cultural destination. Some hybrid forms of retail areas do well, while others do not. For an analysis and comparison of St. Armands retail mix see page 2-13.

Summary

In General, the economic climate for St. Armands Circle is very good. A recent building boom within the Circle's primary market area has added thousands of new rooftops that will soon be filled with thousands of new customers. In addition to a very wealthy local clientele, the Circle draws a significant proportion of its clientele from the state, national and international market. Such clientele are almost always excellent customers.

The Sarasota area (i.e. the City of Sarasota, Sarasota County, and Manatee County) is generally very wealthy, white, well educated and mature in age. An analysis of local radii around the Circle and the local zip code reveals a similar demographic with even higher income in the area immediately surrounding the Circle. Retail sales are strong in the area, particularly within the city limits. Currently unemployment rates are low (4.5%), job growth remains strong (4,000 new jobs this year). Forbes.com recently ranked Sarasota as number 4 on its top 200 Best Places for Business and Careers.<sup>6</sup> Tourism remains the biggest economic sector, though the economy is becoming more diversified.

The only major negative aspect of the St. Armands economic climate is its intense seasonality. There is a very high proportion of seasonal residents in the area, particularly on Lido and Longboat Keys. Those two Keys are immediately adjacent to St. Armands and house the majority of the very wealthy residents in the area. Up to 47% of those households are seasonal households, many being completely vacant for 9 months of the year. This, however, is by no means an insurmountable problem.

The Building Boom Near St. Armands Circle

In the past few years, there has been a massive building boom near St. Armands Circle. A total of 2,808 new condominium units have been completed or are currently pending within a 3-mile radius of the Circle. This equates to a 21% increase in population (almost 4,000 new residents). Such a population will generate over 87 million additional dollars of retail demand. The influx of people and expenditures will also have a multiplicative effect on the local economy. As the new residents spend more, local merchants will earn more... those local merchants then spend more on their needs and wants which increases some other merchant's earnings... and so the cycle continues.

Increased retail demand of 87 million dollars, all within a 3-mile radius is a massive increase. To put it into perspective, consider the total retail expenditures of the City of Sarasota. In 2002 the total retail expenditures in the city of Sarasota (which extends well beyond a 3-mile radius of St. Armands) was 951 million. An influx of 87 million is equivalent to 9.1% of that total. Keep in mind though, that the 9.1% is all within a 3-mile radius of St. Armands Circle. Thus, there is a much higher probability of those retail dollars being spent on the Circle. Table 2-4 below shows a summary of the calculated impact of the new households generated by the recent building boom.

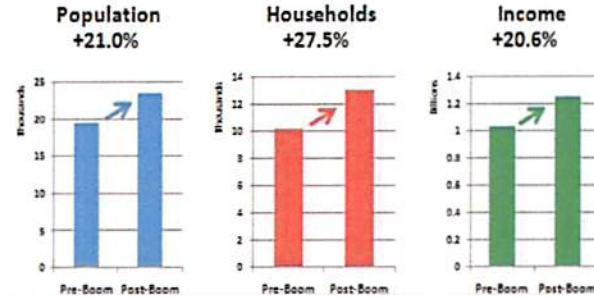
Table 2-5 on the following page shows a listing of all of the recently completed and pending condominium projects in the area.

Seasonality

Seasonality is a major factor in the Sarasota area market. There is a significant proportion of 'snowbird' retirees. As can be seen on Table 3-6 on the following page, over 30% of the Sarasota County population is over 65, and there is a 20.6% vacancy rate of housing units in the County. Almost half (46%) of those vacant homes are for seasonal, recreational or occasional use. The situation is even more extreme on Longboat Key where there are actually more seasonal residents than there are permanent adult residents. Using the established person per household ratio and population, as much as 17% of the adult population in Sarasota and Manatee County could be seasonal. That is equivalent to over 82,000 persons. Obviously, an influx of 80,000 new residents and visitors in a few months' time would have a serious impact on any market. However, such has been the case for decades now and local markets have adapted.

The most detrimental aspect of the intense seasonality is that during the off-season, a majority of the seasonal housing units remain vacant which greatly reduces the population density of the local area. Encouraging off-season rentals of vacant units is a traditional method of combating this problem. That solution has limited potential here though. Many of the vacant unit owners are wealthy enough that the increased income from renting their units is not worth the inconvenience and risk that renting incurs. The only other way to increase local density is to build new transit or hospitality lodging units.

## The Condo Building Boom



Source: Strategic Planning Group, Inc. 2008

Figure 2-2: The Condo Building Boom

### Impact of New Households From Condo Boom, 3 Mile Radius of St. Armands

	W/O Condos 2007 Estimate	W/ Condos 2012 Estimate	Increase	Percentage Increase
Population	19,406	23,399	3,993	21.0%
Households	10,195	13,003	2,808	27.5%
Income	\$1,030,051,074	\$1,241,994,247	\$211,943,173	20.6%
Retail Demand	\$424,836,152	\$512,250,383	\$87,414,231	20.6%

Source: Sarasota City Planning Dept., US Census, Claritas Data & Strategic Planning Group, Inc. 2008

Table 2-4: Impact of New Households, 3 mile Radius

Transit/Hospitality Units

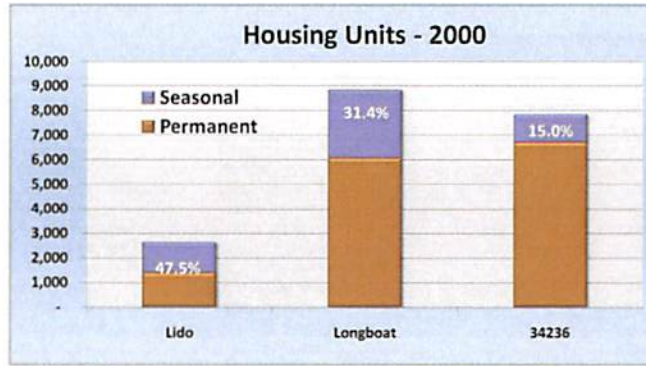
Given the County's excellent beaches, restaurants and shopping, the County's lodging facilities are limited. Today, Sarasota County has only 81 hotel/motels with 4,957 rooms, ranking it 19th in Florida, significantly less than the non-Disney markets of Pinellas, Hillsborough, Volusia, Lee, Brevard, Bay, Escambia, Collier, Polk, Leon and St. Johns Counties. This in spite of the fact, that Sarasota is the 11th top destination in the State for visitors. This is further surprising given that, as noted in Visit Florida's 2007 tourism statistics, the top two activities for Florida visitors are (1) shopping and (2) Beach/Waterfront.

**Recently Completed and Pending Condominium Projects in the St. Armand's Circle Area**

Status	Project Name	General Location	Number of Residential Units	Estimated Development Value [\$ Millions]	Within Radius (Miles)
<b>Completed Projects</b>	Beau Ciel Condominiums	1000 Blvd. of the Arts	44	\$ 40,000,000	3
	Central Avenue Mixed Use	650 Central Avenue	14	\$ 1,600,000	3
	Courthouse Centre	1975 Ringling Blvd.	19	\$ 20,000,000	3
	Five Points Property	1401 Main Street	50	\$ 75,000,000	3
	Golden Bay Condominium	Golden Gate Point	10	\$ 10,000,000	3
	Grande Riviera	420 Golden Gate Point	13	\$ 24,000,000	3
	La Bella Sara	438 Golden Gate Point	29	\$ 40,000,000	3
	Majestic Bay	258 Golden Gate Point	10	N/A	3
	Marina Towers	1227 Gulfstream Boulevard	42	\$ 25,000,000	3
	Marque En Ville	1240 Fruitville Road	29	\$ 8,000,000	3
	Renaissance Phase I	750 N. Tamiami Trail	244	\$ 75,000,000	3
	Sarasota Bay Club [Phases I & II]	N. Tamiami Trail	300	\$ 200,000,000	3
	The Phoenix	Golden Gate Point	13	\$ 9,000,000	3
	Tower Residences at the Ritz	Gulfstream Avenue	80	\$ 75,000,000	3
	Vista Bay Point Condominiums	Golden Gate Point	17	\$ 12,000,000	3
	Whole Foods Center [100 Central]	1487 First Street	95	\$ 40,000,000	3
	Burns Court Villas	562 S. Palm / 1523 & 1549 Oak St.	23	\$ 8,000,000	3
	Harbor View Condominiums	650 Golden Gate Point	14	\$ 6,000,000	3
	Renaissance Phase II [Alinari]	800 N. Tamiami Trail	205	\$ 75,000,000	3
	Ringling Court [Kanaya]	505 S. Orange Avenue	35	\$ 18,000,000	3
	Rivo @ Ringling	32 S. Osprey Avenue	106	\$ 40,000,000	3
	RMC Mixed-Use	1012 N. Tamiami Trail	187	\$ 25,000,000	3
	San Marco	1188 N. Tamiami Trail	23	\$ 5,000,000	3
	Sarasota Main Street Apts.	1350 Main Street	134	\$ 30,000,000	3
	The Encore Townhouses	Cocoanut Avenue & Fruitville	15	\$ 2,200,000	3
	The Savoy on Palm	400 & 427 South Palm Avenue	24	\$ 16,000,000	3
	Twin Oaks Townhomes	1825 Laurel Street	8	N/A	3
	888 S. Orange Avenue Condominium	888 S. Orange Avenue	12	\$ 5,200,000	3
	Casa De Mayo	283 Golden Gate Point	16	\$ 10,000,000	3
	HIPP Properties	5 <sup>th</sup> Street		\$ 1,500,000	3
<b>Pending Projects</b>	1301 Main Street	1301 Main Street	15	N/A	3
	1740 Main Street	1740 Main Street	49	\$ 20,000,000	3
	Avalon Mixed-Use	Central & Fruitville		N/A	3
	Bank of America	1605 Main Street	78	N/A	3
	Hudson Commons	1710-1720 Alderman	8	N/A	3
	Orange Ave. Mixed Use	307 & 401 S. Orange Avenue	99	N/A	3
	Premiere At Main Plaza	1900 Fruitville Road	118	N/A	3
	Sarasota Bayside [Quay]	231,333,555 N. Trail	540	\$ 1,000,000,000	3
	The Demarcay	33 Palm Avenue	39	N/A	3
	The Residences at Hyde Park	2067 Hyde Park Street	39	N/A	3
	Villa Grande	3688 Fruitville Road	104	N/A	5
	Washington Lofts	200 N. Washington Blvd.	12	N/A	3
<b>Completed</b>			1,811	\$ 896,500,000	
<b>Pending</b>			1,101	\$ 1,020,000,000	
<b>Total</b>			2,912	\$ 1,916,500,000	

Source: Sarasota City Planning Department & Strategic Planning Group, Inc., 2008.

Table 2-5: Recently Completed and Pending Condominium Projects in the St. Armands Circle Area



Source: Strategic Planning Group, Inc., 2008

Figure 2-3: Housing Units - 2000

Seasonality in Housing, Sarasota Area, 2000

	Zip Code 34236	Lido Key	Longboat Key	Sarasota City	Sarasota County	Manatee County	State of Florida
<b>Age</b>							
Median age (years)	51.1	66.7	67.9	41.1	49.6	43.6	38.7
Persons 65+	33.1%	31.50%	58.30%	22.0%	31.5%	24.9%	17.6%
Persons Under 18	18.4%	16.2%	20.7%	22.8%			
<b>Housing</b>							
Total housing units	7,845	2,665	8,834	26,935	216,926	166,302	7,302,947
Occupied housing units	79%	64.30%	48.4%	87.0%	79.4%	81.5%	86.8%
Owner-occupied	42%	82.0%	66.2%	50.8%	61.7%	59.4%	60.8%
Renter-occupied	37%	18.0%	33.8%	36.2%	17.7%	22.1%	26.0%
Vacant housing units	21%	35.70%	51.6%	12.9%	20.6%	18.5%	13.2%
Seasonal, rec., or occ. Use	15%	31.40%	47.5%	6.6%	9.4%	10.1%	6.6%
Homeownership rate	54.10%	N/A	91.9%	58.4%	79.1%	73.8%	70.1%
<b>Seasonal Population</b>							
Seasonal, rec., or occ. HHs	1,149	836.81	4,196.15	1,773	20,450	16,845	482,944
Persons per household, 2000	1.80	1.73	1.78	2.12	2.13	2.29	2.59
Seasonal population	2,068	1,448	7,469	3,759	43,559	38,575	1,250,825
(% of adult population)	20.2%	50.1%	101%	8.7%	15.9%	18.4%	10.1%

Source: US Census, 2000, DataPlace.org & Strategic Planning Group Inc., 2008

Table 2-4: Seasonality in Housing, Sarasota Area, 2000

Demographic & Economic Overview of Sarasota City & County, 2000

	Sarasota City	Sarasota County	Manatee County	State of Florida
<b>Population &amp; Households</b>				
Population, 2000	52,715	325,957	264,002	15,982,378
Households	24,866	153,031	115,285	6,170,802
Persons Per Household, 2000	2.12	2.13	2.29	2.59
<b>Income</b>				
Median family income (dollars)	\$ 40,398	\$ 59,190	\$ 53,989	\$ 45,625
Mean family income (dollars)	N/A	\$ 81,527	\$ 71,029	\$ 72,583
Median Household Income (dollars)	\$ 34,077	\$ 48,416	\$ 45,272	\$ 38,819
Mean Household Income (dollars)	\$ 36,100	\$ 67,853	\$ 60,877	\$ 62,637
<b>Employment</b>				
Employment (16 and over)	23,298	162,981	142,987	6,995,047
Retail tradespeople	3,142	23,427	20,067	943,449
<b>Sales (City Data: 1997; Other Data: 2002)</b>				
Retail sales (\$1000)	931,609	4,434,320	2,703,995	191,805,685
Retail sales per capita	\$18,265	\$13,039	\$9,650	\$11,498
Accommodation and foodservices (\$1000)	183,456	579,129	297,414	29,366,940
<b>Geography</b>				
Land area (square miles)	15.0	571.6	741.0	53,926.8
Persons per square mile	3,539.8	569.9	356.3	296.4
<b>Age</b>				
Median age (years)	41.1	49.6	43.6	38.7
Persons 65+	22.0%	31.5%	24.9%	17.6%
Persons Under 18	18.4%	16.2%	20.7%	22.8%
<b>Housing &amp; Homeownership</b>				
Total housing units	26,935	216,926	166,302	7,302,947
Occupied housing units	87.0%	79.4%	81.5%	86.8%
Owner-occupied housing units	50.8%	61.7%	59.4%	60.8%
Renter-occupied housing units	36.2%	17.7%	22.1%	26.0%
Vacant housing units	12.9%	20.6%	18.5%	13.2%
Seasonal, recreational or occasional	6.6%	9.4%	10.1%	6.6%
Homeownership Rate	58.4%	79.1%	73.8%	70.1%
<b>Race &amp; Ethnicity</b>				
White Persons	76.9%	93.2%	88.4%	80.2%
Black or African American Persons	16.0%	4.5%	8.8%	15.8%
Hispanic or Latino (of any race)	11.9%	4.3%	9.3%	16.8%
<b>Education &amp; School Enrollment</b>				
High school (grades 9-12) enrollment	3.8%	3.8%	4.2%	5.3%
College or graduate school enrollment	5.1%	3.1%	3.1%	5.5%
High School Graduates (age 25+)	80.1%	87.1%	81.4%	79.9%
Bachelor's Degree or Higher (age 25+)	25.7%	27.4%	20.8%	22.3%

Source: US Census, 2000 & Strategic Planning Group Inc., 2008

Table 2-7: Demographic and Economic Overview of Sarasota City and County, 2000



**Economics & Demographics**  
*Regional - City of Sarasota, Sarasota & Manatee Counties*

The regional market for St. Armands Circle includes the City of Sarasota and large areas of Sarasota and Manatee Counties. Relative to Florida and the US, the local market for St. Armands Circle is older, wealthier, whiter and more educated. Such a combination has traditionally been a successful target market for upscale retail shopping areas.

Table 2-7 on the previous page shows a demographic and economic overview for the City of Sarasota and Sarasota and Manatee Counties. These areas are generally older, wealthier, whiter and more educated than the state averages. Older populations typically have lower persons per household ratios, which holds true here. Median income in Sarasota County is \$48,416 compared to the Florida median income: \$38,819. Also noteworthy is that approximately 14% of employed persons in the area are retail trades people directly employed by the retail industry. Median age for the County is 49.6 compared with a statewide median of 38.7. Over 30% of Sarasota County is over age 65. There is also a very significant seasonal variable in the local population (this is discussed in more detail on page 2-10). Also, Sarasota is overwhelmingly white (93.2%). Lastly, Sarasota County is significantly more educated than the state as a whole.

**Radius of St. Armands**

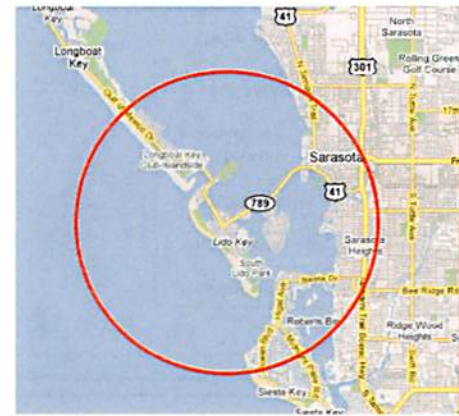
In evaluating the economic climate of St. Armands Circle it is critical to study the immediate surrounding areas. Thus, below is an analysis of a 3, 5, and 10-mile radius around St. Armands Circle. These radii can be seen on Figure 2-5. Table 2-10 (page 2-10) shows the demographics (population, age, education, race & ethnicity) of the radii.

Table 2-9 is an analysis of households (number, income, type, size) within the radii and Table 2-11 shows household trends (population, households and income). In general, these tables show very high and increasing incomes, mature ages, high levels of education and an overwhelming majority of whites. In short, the area immediately surrounding St. Armands Circle is composed of mature, wealthy, white and well-educated households that wield significant and increasing purchasing power.



Source: Strategic Planning Group, Inc. 2008

Figure 2-4: Radii of St. Armands Circle



Source: Claritas, Inc. 2008, Strategic Planning Group, Inc. 2008

Figure 2-5: Three Mile Radius Market (Old Assumptions)

**3 Mile Radius**

**Population:**  
19,359

**Households:**  
10,007

**Median HH Income:**  
\$47,779

Household Trend					
St. Armands Circle					
Radius 1: 0.00 - 3.00 Miles, Total					
Description	2000	2007	%Change	2012	%Change
	Census	Estimate	2000-2007	Projection	2007-2012
<b>Inverse Totals</b>					
Population	19,359	19,406	0.24%	19,722	1.63%
Households	10,007	10,195	1.88%	10,482	2.82%
Families	4,922	4,917	-1.30%	4,968	1.04%
Housing Units	13,833	14,451	4.47%	14,874	2.93%
Group Quarters Population	848	862	1.65%	880	2.09%

Source: Claritas, Inc. 2008, Strategic Planning Group, Inc. 2008

Table 2-8: Claritas Population Estimates and Projections without Condo Boom

**Recently Completed Condominium Projects in the St. Armand's Circle Area**

Status	Project Name	General Location	Number of Residential Units	Estimated Development Value (\$ Millions)	Within Radius (Miles)
Completed	Beau Ciel Condominiums	1000 Blvd. of the Arts	44	\$ 40,000,000	3
Projects	Central Avenue Mixed Use	650 Central Avenue	14	\$ 1,600,000	3
	Courthouse Centre	1975 Ringling Blvd.	19	\$ 20,000,000	3
	Five Points Property	1401 Main Street	50	\$ 75,000,000	3
	Golden Bay Condominium	Golden Gate Point	10	\$ 10,000,000	3
	Grande Riviera	420 Golden Gate Point	13	\$ 24,000,000	3
	La Bella Sara	438 Golden Gate Point	29	\$ 40,000,000	3
	Majestic Bay	258 Golden Gate Point	10	N/A	3
	Marina Towers	1227 Gulfstream Boulevard	42	\$ 25,000,000	3
	Marque En Ville	1240 Fruitville Road	29	\$ 8,000,000	3
	Renaissance Phase I	750 N. Tamiami Trail	244	\$ 75,000,000	3
	Sarasota Bay Club [Phases I & II]	N. Tamiami Trail	300	\$ 200,000,000	3
	The Phoenix	Golden Gate Point	13	\$ 9,000,000	3
	Tower Residences at the Ritz	Gulfstream Avenue	80	\$ 75,000,000	3
	Vista Bay Point Condominiums	Golden Gate Point	17	\$ 12,000,000	3
	Whole Foods Center [100 Central]	1487 First Street	95	\$ 40,000,000	3
	Burns Court Villas	562 S. Palm / 1523 & 1549 Oak St.	23	\$ 8,000,000	3
	Harbor View Condominiums	650 Golden Gate Point	14	\$ 6,000,000	3
	Renaissance Phase II [Alinari]	800 N. Tamiami Trail	205	\$ 75,000,000	3
	Ringling Court [Kanaya]	505 S. Orange Avenue	35	\$ 18,000,000	3
	Rivo @ Ringling	32 S. Osprey Avenue	106	\$ 40,000,000	3
	RMC Mixed-Use	1012 N. Tamiami Trail	187	\$ 25,000,000	3
	San Marco	1188 N. Tamiami Trail	23	\$ 5,000,000	3
	Sarasota Main Street Apts.	1350 Main Street	134	\$ 30,000,000	3
	The Encore Townhouses	Cocanut Avenue & Fruitville	15	\$ 2,200,000	3
	The Savoy on Palm	400 & 427 South Palm Avenue	24	\$ 16,000,000	3
	Twin Oaks Townhomes	1825 Laurel Street	8	N/A	3
	888 S. Orange Avenue Condominium	888 S. Orange Avenue	12	\$ 5,200,000	3
Casa De Mayo	283 Golden Gate Point	16	\$ 10,000,000	3	
HIPP Properties	5 <sup>th</sup> Street		\$ 1,500,000	3	
<b>Completed</b>			<b>1,811</b>	<b>\$ 896,500,000</b>	

Source: Strategic Planning Group, Inc., 2008

- 30 Completed Projects
- Over 1,800 New Households
- Over 3,000 New Residents
- Over \$1 Billion in Development Value
- All Within A 3 Mile Radius

Figure 2-6: Summary of Recent Condo Construction

**Pending Condominium Projects in the St. Armand's Circle Area**

Status	Project Name	General Location	Number of Residential Units	Estimated Development Value (\$ Millions)	Within Radius (Miles)
Pending	1301 Main Street	1301 Main Street	15	N/A	3
Projects	1740 Main Street	1740 Main Street	49	\$ 20,000,000	3
	Avalon Mixed-Use	Central & Fruitville		N/A	3
	Bank of America	1605 Main Street	78	N/A	3
	Hudson Commons	1710-1720 Alderman	8	N/A	3
	Orange Ave. Mixed Use	307 & 401 S. Orange Avenue	99	N/A	3
	Premiere At Main Plaza	1900 Fruitville Road	118	N/A	3
	Sarasota Bayside [Quay]	231,333,555 N. Trail	540	\$ 1,000,000,000	3
	The Demarcay	33 Palm Avenue	39	N/A	3
	The Residences at Hyde Park	2067 Hyde Park Street	39	N/A	3
	Villa Grande	3688 Fruitville Road	104	N/A	5
	Washington Lofts	200 N. Washington Blvd.	12	N/A	3
			<b>1,101</b>	<b>\$ 1,020,000,000</b>	

Source: Strategic Planning Group, Inc., 2008

- 12 Pending Projects
- Over 1,100 New Households
- Over 2,000 New Residents
- Over \$1 Billion in Development Value
- All Within A 3 Mile Radius

Figure 2-7: Summary of Pending Condo Construction

Secondary Demographic Projections

The Project Team used Claritas, Inc. a major independent demographic/retail data provider, and a part of the Nielson corporate family, to prepare demographic and retail supply and demand data for 2007 and projections for 2012. The data show that the current permanent population of the 3-mile radius market is 19,359 occupying 10,007 households. Unfortunately, the data does not reflect the condo boom of the last 3 years within the 3-mile market nor does it calculate the large number of seasonal or tourist transit units within the market.

Furthermore, those statistics show only minor "roof top" or population growth within the Circle's primary 3-mile radius market area as shown in Table 8. Claritas only calculated an increase of 188 residential units within the market, and 47 people by 2012.

As previously discussed, the condo building boom of the last several years has added over 1,800 roof tops with another 1,100 pending.

As noted earlier, this discrepancy of failing to account for a fundamental change in the city's economic base, undercounted the market's "roof tops" by 27.5% and over \$87 million in retail demand.

As a result, the Project Team, modified the Claritas data to take into account the new and pending "roof tops" as reported earlier. This data was used to calculate the demographic and retail demand figures for 2012. This data is shown, in part, in Table 2-9. Of note on Table 2-9 is the significant rate of growth in the 10-mile radius. Also of note is the rather elderly and well-educated nature of the residents within the 3-mile radius.

Of note on Table 2-10 is the rate of growth of households in the 10-mile radius, the extremely high incomes of the 3 and 5-mile radii, and the relatively smaller household size of the 3-mile radius.

Of note on Table 2-11 is the relatively rapid increase in incomes. In all cases, incomes are rising faster than populations. Income per capita is rising significantly in all radii. Furthermore, the increases in income are all well above simple inflationary increases; this suggests a significant increase in real income and real purchasing power. Also noteworthy are the 2012 projections that

**Demographics of Households near St. Armand's Circle**

Radius	3 mile	%	5 mile	%	10 mile	%
<b>Households</b>						
2012 Projection	13,290		45,084		157,047	
2007 Estimate	11,318		42,082		144,032	
2000 Census	10,007		39,924		128,226	
1990 Census	9,724		38,397		110,061	
<b>Growth 2007 - 2012</b>	<b>17.42%</b>		<b>7.13%</b>		<b>9.04%</b>	
<b>Growth 2000 - 2007</b>	<b>13.10%</b>		<b>5.40%</b>		<b>12.33%</b>	
Growth 1990 - 2000	2.91%		3.98%		16.50%	
<b>Household Income</b>						
Income Less than \$15,000	1,332	13.07	5,592	13.67	16,070	11.25
Income \$15,000 - \$24,999	1,070	10.50	5,497	13.43	17,286	12.10
Income \$25,000 - \$34,999	885	8.68	4,951	12.10	17,751	12.42
Income \$35,000 - \$49,999	1,403	13.76	6,776	16.56	23,901	16.73
Income \$50,000 - \$74,999	1,615	15.84	7,195	17.58	28,311	19.82
Income \$75,000 - \$99,999	871	8.54	3,451	8.43	14,732	10.31
Income \$100,000 - \$149,999	1,331	13.06	3,792	9.27	14,436	10.10
Income \$150,000 - \$249,999	760	7.45	1,723	4.21	6,026	4.22
Income \$250,000 - \$499,999	516	5.06	1,069	2.61	2,632	1.84
Income \$500,000 or more	412	4.04	871	2.13	1,722	1.21
<b>Average Household Income</b>	<b>\$99,847</b>		<b>\$73,119</b>		<b>\$69,068</b>	
<b>Median Household Income</b>	<b>\$56,312</b>		<b>\$44,781</b>		<b>\$47,756</b>	
Per Capita Income	\$53,079		\$34,727		\$32,224	
<b>Household Type</b>						
Family Households	4,917	48.23	21,987	53.74	85,401	59.78
Nonfamily Households	5,279	51.78	18,931	46.27	57,467	40.22
<b>Household Size</b>						
1-person household	4,549	44.62	15,380	37.59	47,407	33.18
2-person household	4,164	40.84	16,063	39.26	60,026	42.02
3-person household	748	7.34	4,643	11.35	16,935	11.85
4-person household	443	4.35	2,869	7.01	11,452	8.02
5-person household	175	1.72	1,205	2.94	4,575	3.20
6-person household	76	0.75	490	1.20	1,585	1.11
7 or more person household	41	0.40	267	0.65	888	0.62
<b>Average Household Size</b>	<b>1.82</b>		<b>2.05</b>		<b>2.12</b>	

Source: Claritas Data 2008, US Census, Sarasota City Planning Dept. & Strategic Planning Group, Inc. 2008

Table 2-9: St. Armands Circle Demographic Summary

**St. Armand's Circle Demographic Summary - Radii**

Radius	3 miles	%	5 miles	%	10 miles	%
<b>Population</b>						
2012 Projection	23,715		93,218		335,298	
2007 Estimate	21,003		89,005		310,914	
2000 Census	19,359		86,666		281,272	
1990 Census	19,291		84,162		246,509	
<b>Growth 2007 - 2012</b>	<b>12.91%</b>		<b>4.73%</b>		<b>7.84%</b>	
<b>Growth 2000 - 2007</b>	<b>8.49%</b>		<b>2.70%</b>		<b>10.54%</b>	
Growth 1990 - 2000	0.35%		2.98%		14.10%	
<b>Age, 2007</b>						
Age 16 and over	17,366	89.49	74,057	84.78	260,731	84.31
Age 18 and over	17,090	88.07	72,389	82.87	254,488	82.29
Age 21 and over	16,723	86.17	69,572	79.65	245,540	79.40
Age 65 and over	6,481	33.40	21,225	24.30	80,441	26.01
2007 Est. Median Age	<b>54.41</b>		45.77		46.65	
2007 Est. Average Age	<b>51.60</b>		45.12		45.67	
<b>Education, 2007</b>						
Master or Higher Degree	<b>18.3%</b>		11.6%		10.4%	
US Average Master's	8.9%		8.9%		8.9%	
Bachelor's Degree	<b>27.0%</b>		18.3%		17.8%	
US Average Bachelor's	15.7%		15.7%		15.7%	
<b>Race &amp; Ethnicity, 2007</b>						
White Alone	16,923	87.20	70,194	80.36	270,050	87.32
Black or African American	1,234	6.36	10,731	12.29	19,937	6.45
Hispanic or Latino	1,853	9.55	11,827	13.54	31,592	10.22

Source: Claritas Data 2008 & Strategic Planning Group, Inc. 2008

Table 2-10: Demographics of Households near St. Armands Circle

**Radii: population, Households & Income Trends**

<b>3 Mile Radius, Population, Households &amp; Income</b>					
	2000	2007	%Δ 00-07	2012	%Δ 07-12
Population	19,359	21,319	10.13%	23,715	11.24%
Income Per Capita	47,753	53,079	11.2%	58,198	9.64%
Households	10,007	11,318	13.10%	13,290	17.42%
Avg HH Income	\$89,894	\$99,847	11.1%	\$108,325	8.49%
Median HH Income	\$47,779	\$56,312	17.9%	\$61,132	8.56%
HH Income >\$100K	24.96%	29.61%		32.20%	
HH Income <\$35K	38.00%	32.24%		30.23%	
<b>5 Mile Radius, Population, Households &amp; Income</b>					
	2000	2007	%Δ 00-07	2012	%Δ 07-12
Population	86,666	89,005	2.70%	93,218	4.73%
Income Per Capita	\$30,271	\$34,727	14.7%	\$37,985	9.38%
Households	39,924	42,082	5.40%	45,084	7.13%
Avg HH Income	\$64,794	\$73,119	12.8%	\$79,229	8.36%
Median HH Income	\$40,057	\$44,781	11.8%	\$47,635	6.37%
HH Income >\$100K	14.31%	18.22%		20.66%	
HH Income <\$35K	44.43%	39.20%		36.66%	
<b>10 Mile Radius, Population, Households &amp; Income</b>					
	2000	2007	%Δ 00-07	2012	%Δ 07-12
Population	281,272	310,914	10.54%	335,298	7.84%
Income Per Capita	\$59,656	69,068	15.8%	\$75,767	9.70%
Households	128,226	144,032	12.33%	157,047	9.04%
Avg HH Income	\$42,065	47,756	13.5%	\$51,973	8.83%
Median HH Income	\$27,567	32,224	16.9%	\$35,567	10.37%
HH Income >\$100K	12.58%	17.37%		20.69%	
HH Income <\$35K	41.83%	35.77%		32.53%	

Source: Strategic Planning Group, Inc. 2008

Table 2-11: Radii: Population, Households, and Income Trends

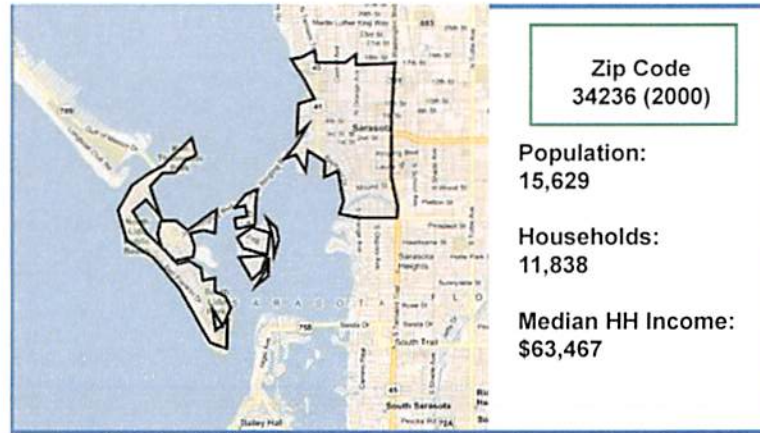
show over 30% of households within 3 miles earning over one-hundred (100) thousand dollars per year, and over 20% of the 5 and 10-mile radii households earning the same. This market wields considerable purchasing power, and is projected to rapidly and continually gain more of it.

**Zip Code of St. Armands**

It is often informative to analyze demographics of a particular area using multiple levels of analysis. In this particular case, a third level is the Zip Code Area of St. Armands Circle. Figure 2-8 shows a map of the St. Armands Circle area Zip Code, 34236.<sup>4</sup> Table 3-12, below, shows some basic demographics of the Zip Code. It shows again that the area is mature, white and particularly wealthy. The Zip Code is in the top 99% of income according to its average tax return Adjusted Gross Income in 2005 of \$171,239.

**Lido and Longboat Keys**

An even further narrowed analysis is one of Lido and Longboat Keys individually. Residents of Lido Key are wealthier, whiter, older and more educated in that zip code. Longboat Key is the same, only to a further extreme. Over 58% of the residents of Longboat Key are over 65 (the median age is 67.9). The median income is \$90,251, which is over \$30,000 more than the median income of Lido Key. The population is extremely well educated, with over 53% of the population holding Bachelor's degrees or higher. Most importantly, a full 47.5% of the housing units on Longboat Key are for Seasonal, Recreational or Occasional use (Lido Key maintains a seasonal housing rate of 31.4%). Table 2-13 shows these demographic data and more.



Source: Strategic Planning Group, Inc., 2008

Figure 2-8: Zip Code 34236: St. Armands Circle Area

Zipcode: 34236 (St. Armands's & Sarasota)	
Population, 2000	11,636
White Alone, 2000	80.4%
Black Alone, 2000	10.5%
Hispanic or Latino, 2000	15.1%
Median Age, 2000	51.1
Average HH Size, 2000	1.8
Average Adjusted Gross Income, 2005	<b>\$171,239</b>
National Ranking of AGI	<b>99%</b>

Source: Melissa Data & SPG Inc. 2008

Table 2-12: Zip Code Demographics of St. Armands Circle Area

	Demographics of Lido & Longboat Keys, 2000			
	Lido Key		Longboat Key	
	#	%	#	%
Population	3,020	100	7,603	100
Aged 65+	1,611	31.5	4,435	<b>58.3</b>
Median age	66.7		<b>67.9</b>	
Median household income	\$ 59,306		<b>\$90,251</b>	
Per capita income	\$ 58,102		<b>\$80,963</b>	
Bachelor's degree or higher	1,341	49.2	6,814	<b>53.1</b>
White	2,970	98.3	7,545	99.2
Black	10	0.3	5	0.1
Hispanic or Latino (of any race)	47	1.6	51	0.7
Total housing units	2,665	100	8,834	100
Occupied housing units	1,714	64.3	4,280	48.4
Vacant housing units	951	35.7	4,554	51.6
Seasonal, rec., or occ., use	836	<b>31.4</b>	4,197	<b>47.5</b>
Homeowner vacancy rate	1.3%		0.7%	
Rental vacancy rate	17.4%		43.9%	
Average Household Size	1.73		1.78	

Source: US Census & Strategic Planning Group, Inc. 2008

Table 2-13: Demographics of Lido and Longboat Keys

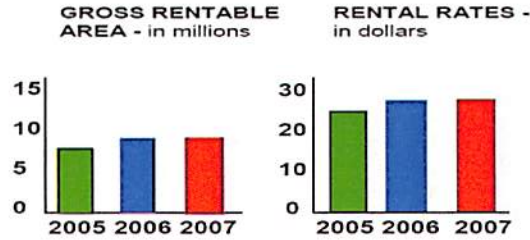
Retail Sales

Retail Sales in the area are strong, particularly within the city limits of Sarasota (where St. Armands Circle is). In 2002 retail sales per capita was \$18,265 in the City of Sarasota compared to \$11,498 for the state of Florida in 2002.<sup>e</sup>

Currently (2008) Sarasota County currently has almost 9 million SF of retail space with a 4.9% vacanc'y factor and weighted average rents at \$15.50 PSF.<sup>f</sup> Manatee County has just over 6 million SF of retail space with a 6.5% vacancy factor and weighted average rents of \$15.73 PSF.<sup>g</sup> Rental rates in the area are increasing, slowly but continually.<sup>h</sup>

Table 2-14 shows retail statistics for the Sarasota area. Retail Sales per capita in the City of Sarasota are far higher than other areas, this is likely due to a concentration of retail areas inside the city limits.

Table 2-14 (right) shows retail sales in the City of Sarasota for 2002 by retail trade category.<sup>i</sup> The three highest grossing categories were food & beverage stores, clothing & clothing accessories stores, and health & personal care stores (excluding auto sales). It is also worthy of noting that the retail trade industry employed 4,798 persons in 2002, which was roughly 9% of the total population.



Source: www.aulrealtyadvisors.com, March 2007 Sarasota Retail Market Report

Figure 2-9: Retail and Rental Rates, 2005-2007

Retail Sales in the Sarasota Area, 2002

	Sarasota City	Sarasota County	Manatee County	State of Florida
Retail sales (\$1000)	951,459	4,434,320	2,703,995	191,805,685
Retail sales per capita	\$18,265	\$13,039	\$9,650	\$11,498
Accommodation and foodservices (\$1000)	215,807	579,129	297,414	29,366,940

Source: US Census & Strategic Planning Group Inc., 2008

Table 2-14: Retail Sales in the Sarasota Area

MARKET SUPPLY EVALUATION

Retail Mix Comparison

This study includes a comparison of St. Armands Circle to thirteen (13) other well-known and comparable shopping areas. Of those thirteen (13), ten (10) of them can easily be categorized either as "shopping destinations" or "cultural destinations" (Shopping: apparel, accessories & gifts; Cultural: restaurants, entertainment & the arts). St. Armands Circle, along with three other shopping areas are somewhere in-between. This could be considered problematic, or opportunistic, depending on the desired outcome. In general, the Circle has a good mix of merchants and is well positioned to become a shopping destination, cultural destination or a hybrid of the two.

Shopping Destinations

- Paseo Colorado (Pasadena)
- Waterside Shops (Naples)
- Worth Avenue (Palm Beach)
- The Village on Venetian Bay (Naples)

Other

- St. Armands Circle (Sarasota)
- Old Hyde Park (Tampa)
- 3rd Street South (Naples)
- Park Avenue (Winter Park)

Cultural Destinations

- Third Street Promenade (Santa Monica)
- Cocoa Village (Brevard)
- Nantucket (Nantucket)
- Las Olas Blvd (Ft. Lauderdale)
- Westport, CT (Downtown)
- 5th Ave South (Naples)

Categories

The stores and shops in these areas were categorized into eight different categories. They are: Apparel & Accessories, Health & Beauty, Cultural, Food & Dining, Gifts & Specialty, Professional Services, Real Estate & Travel, Other. A more detailed explanation of each category is below:

Apparel & Accessories

- Fashion
- Shoes & Leather
- Children's
- Jewelry & Accessories

Health & Beauty

- Bath & Body
- Cosmetics
- Salons & Spas

Food & Dining

- Dining
- Food & Beverages Shops
- Coffee/Tea
- Cultural
- Entertainment
- Arts & Crafts
- Music
- Books
- Photo
- Tech (Comp, Cell, Etc.)

Gifts, Home & Specialty

- Gifts & Stationary
- Home Furnishings & Appliances
- Specialty Shops

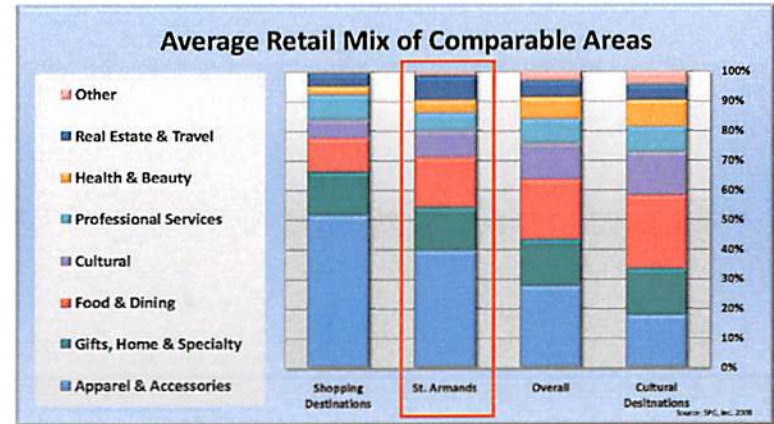
Professional Services

- Financial & Legal
- Medical, Dental, Optical
- Other Services

Real Estate & Travel

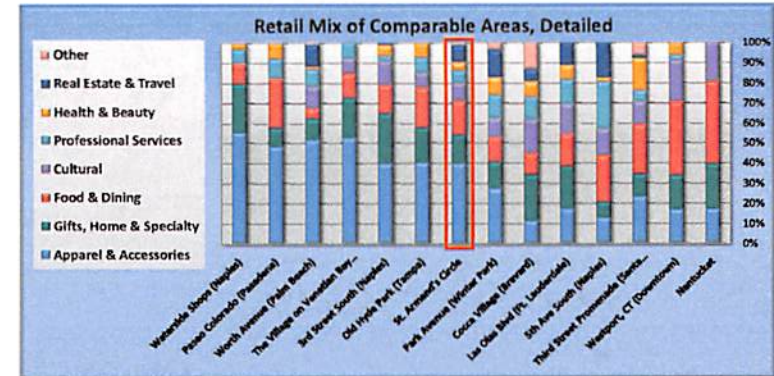
- Real Estate
- Travel
- Lodging & Hotels

Other



Source: Strategic Planning Group, Inc. 2008

Figure 2-10: Type of Retail Mix by District



Source: Strategic Planning Group, Inc. 2008

Figure 2-11: Type of Retail Mix by District

Figure 3-10 compares St. Armands Circle to three categories of retail centers. Overall retail mix in the US; destination shopping, retail mix and cultural destination retail.

Figure 3-11 compares St. Armands Circle with other major tourist retail centers around Florida and the United States.

**Average Retail Mix of Comparable Shopping Areas**

Shopping Destinations	St. Armands	Overall	Cultural Centers
Apparel & Accessories	45	36	34
Gifts, Home & Specialty	13	20	29
Food & Dining	10	27	46
Cultural	5	16	28
Professional Services	7	11	16
Health & Beauty	3	10	17
Real Estate & Travel	4	7	10
Other	1	4	9
<b>Number of Stores</b>	<b>87</b>	<b>131</b>	<b>189</b>
% Apparel & Accessories	52%	28%	16%
% Gifts, Home & Specialty	16%	16%	17%
<b>% Apparel &amp; Gifts</b>	<b>68%</b>	<b>43%</b>	<b>33%</b>
% Food & Dining	13%	20%	26%
% Cultural	5%	12%	16%
<b>% Food, Dining &amp; Cultural</b>	<b>18%</b>	<b>32%</b>	<b>42%</b>

Source: Strategic Planning Group, Inc., 2008

Table 2-15: Average Retail Mix of Comparable Shopping Areas

Table 2-16 (right) enumerates the retail mix of each of the different areas surveyed in this research. They are arranged with the "shopping destinations" on the left and the "cultural destinations" on the right.

**Retail Mix of Comparable Shopping Areas, Detailed**

	Waterside Shops (Naples)	Paseo Colorado (Pasadena)	Worth Avenue (Palm Beach)	The Village on Venetian Bay (Naples)	3rd Street South (Naples)	Old Hyde Park (Tampa)	St. Armand's Circle	Park Avenue (Winter Park)	Cocca Village (Brevard)	Las Olas Blvd (Ft. Lauderdale)	5th Ave (Naples)	Third Street Promenade (Santa Monica)	Westport, CT (Downtown)	Nantucket
Apparel & Accessories	32	35	77	34	30	16	53	28	22	23	18	100	13	26
Gifts, Home & Specialty	14	7	16	13	19	7	19	14	44	28	11	45	13	34
Food & Dining	6	18	8	8	11	8	23	13	22	22	33	109	29	63
Cultural	0	0	16	5	9	3	12	10	33	20	19	48	16	30
Professional Services	4	7	13	5	2	3	8	12	22	16	33	24	2	0
Health & Beauty	2	6	2	0	4	3	6	9	15	10	3	69	5	0
Real Estate & Travel	0	0	16	0	1	0	11	14	12	15	25	6	0	0
Other	0	0	2	0	0	0	2	4	26	0	0	27	0	0
<b>Number of Stores</b>	<b>58</b>	<b>73</b>	<b>150</b>	<b>65</b>	<b>76</b>	<b>40</b>	<b>134</b>	<b>104</b>	<b>196</b>	<b>134</b>	<b>142</b>	<b>428</b>	<b>78</b>	<b>153</b>
% Apparel & Accessories	55%	48%	51%	52%	39%	40%	40%	27%	11%	17%	13%	23%	17%	17%
% Gifts, Home & Specialty	24%	10%	11%	20%	25%	18%	14%	13%	22%	21%	8%	11%	17%	22%
<b>% Apparel &amp; Gifts</b>	<b>79%</b>	<b>58%</b>	<b>62%</b>	<b>72%</b>	<b>64%</b>	<b>58%</b>	<b>54%</b>	<b>40%</b>	<b>34%</b>	<b>38%</b>	<b>20%</b>	<b>34%</b>	<b>33%</b>	<b>39%</b>
% Food & Dining	10%	25%	5%	12%	14%	20%	17%	13%	11%	16%	23%	25%	37%	41%
% Cultural	0%	0%	11%	8%	12%	8%	9%	10%	17%	15%	13%	11%	21%	20%
<b>% Food, Dining &amp; Cultural</b>	<b>10%</b>	<b>25%</b>	<b>16%</b>	<b>20%</b>	<b>26%</b>	<b>28%</b>	<b>26%</b>	<b>22%</b>	<b>28%</b>	<b>31%</b>	<b>37%</b>	<b>37%</b>	<b>58%</b>	<b>61%</b>

Source: Strategic Planning Group, Inc., 2008

Table 2-16: Retail Mix of Comparable Shopping Areas, Detailed

Real Estate on St. Armands Circle

An analysis of real estate values for retail properties on St. Armands Circle shows very high land values accompanied by relatively low improvement (building) values. This is an indication both of the highly desirable location of the Circle, and the aged, unimproved condition of many of the buildings on the Circle (note the average year built, 1960). The land value is most indicative of the desirability of the location. Land value per square foot ranges between \$202 and \$300, depending on the quadrant. The overall land value per square foot is \$263.22. From a business perspective the more important value is the total value per square foot. That value ranges from \$424 to \$544 per square foot with an overall average of \$504 per square foot. From a potential developer's perspective, the most important value is the total value per square foot of land area. That value ranges from \$168 to \$433 with an overall average of \$267 per square foot. It should be noted that in 92% of cases for which data was available, the value of the land exceeds the value of the building. On average, land value makes up 68% of the total value of the retail outlets on the Circle.

**BID Data Summary: Values, Rents & SF by Quadrant**

Quadrant	Pink	Gold	Aqua	Purple	Overall
Average Total Value	\$ 1,941,364	\$ 2,751,310	\$ 2,593,207	\$ 1,816,776	\$ 2,313,775
Total Value	\$ 21,355,000	\$ 27,513,100	\$ 36,304,900	\$ 38,152,300	\$ 136,512,700
Average Year Built	1960	1960	1964	1958	1960
Average Land Area (SF)	11,545	14,788	7,361	4,187	8,638
Total Land Area (SF)	126,994	147,879	103,053	87,925	509,655
Average Living Area (SF)	4,711	6,413	6,872	3,896	5,646
Total Living Area (SF)	51,818	64,132	96,214	81,819	333,121
Average Land Value	\$ 1,375,918	\$ 1,894,240	\$ 1,513,264	\$ 1,206,362	\$ 1,510,532
Total Land Value	\$ 15,135,100	\$ 18,942,400	\$ 21,185,700	\$ 25,333,600	\$ 89,121,400
Average Improved Value	\$ 564,536	\$ 866,070	\$ 1,079,943	\$ 610,414	\$ 804,598
Total Improved Value	\$ 6,209,900	\$ 8,660,700	\$ 15,119,200	\$ 12,818,700	\$ 47,471,300
Land Value / Land Area	\$ 278.29	\$ 202.13	\$ 249.24	\$ 300.68	\$ 263.22
Total Value / Living Area	\$ 524.38	\$ 644.14	\$ 424.86	\$ 500.85	\$ 504.23
Total Value / Land Area	\$ 168.16	\$ 186.05	\$ 352.29	\$ 433.92	\$ 267.85
Land Value (% of Total)	73%	66%	62%	71%	68%

Source: St. Armand's BID 2008 & The Strategic Planning Group, Inc. 2008

Table 2-17: BID Data Summary: Values, Rents, and Square Feet by Quadrant

**Survey Results: Quantitative Data**

	Rent	Square Feet	Increase in Rent Over Past 3 Years	Annual Rent/SF
Average	\$9,743.19	1,870	7.5%	\$76.30
Median	\$7,895.00	1,328	5.0%	\$73.50
Minimum	\$1,750.00	250	0.0%	\$45.66
Maximum	\$34,000.00	11,500	15.8%	\$106.80

Source: St. Armand's BID Survey, 2008 & Strategic Planning Group, Inc. 2008

Table 2-18: Survey Results: Quantitative Data



**SURVEYS, SURVEY RESULTS, & SURVEY ANALYSIS**

There are 57 owners of the retail and office space on St. Armands Circle. These owners are critical stakeholders in the revitalization of St. Armands. A survey was used to gain their input and insight. A Commercial Revitalization Survey was designed and distributed to each of the 57 owners. There was a response rate of 33.3% with 27% of stores represented (due to varying levels of ownership). The survey included quantitative questions and a significant amount of open-ended questions (the implement is included in the appendix). The quantitative responses were limited and inconsistent but did provide some useful data. The open-ended questions, however, produced a wealth of valuable insight from a well-informed and critically important group of stakeholders.

**Survey Results**

The survey comments are organized by category on Table 2-19. The useful quantitative survey results are listed on Table 2-18. (Two supplementary tables with survey comments organized in a different manner are included in the appendix). Table 2-20 shows a wider variation in square footage per retail outlet. The square footage ranges from as small as 250 square feet to as large as 11,500 square feet.

**Geographic Area Served**

As already discussed, the survey confirmed that 73% of its market was tourist and Lido/Longboat Keys residents. Figure 2-12, shows the normal geographic markets served by the St. Armands Circle retailers.

**Customer Age**

As reported in the surveys, 58% of the customers are over the age of 50. The 50 age group includes the "baby boom" generation who are beginning to enter into retirement age and are securing second homes and/or are moving their primary residents. In total, this represents over 79 million people.

**Geographic Market Served**

The Circle does show the ability to draw from a larger market. Visitor data taken from the Smooth Jazz festival (a special event) shows that 51% of the visitors came from

outside Sarasota.

Bradenton and Tampa represented the largest out-of-area attendance, followed by the NE United States and the Midwest United States. What is unknown is whether the out-of-state visitors are second-home owners.

**Survey Analysis**

The primary concerns of the owners who responded to the survey can be organized into four main categories: **Environment & Appearance, Accessibility & Parking, Traffic Generators,** and the **Mix of Merchants.** These are closely related to the three critical elements of successful destination retailing:

- Attraction
- Convenience
- Environment

Traffic generation concerns attraction, parking & accessibility concerns convenience and environment & appearance concerns environment. The fourth category, mix of merchants is also clearly very important. A vast majority of the issues raised by the owners would be addressed with a strong revitalization campaign focusing on attraction, convenience and environment.

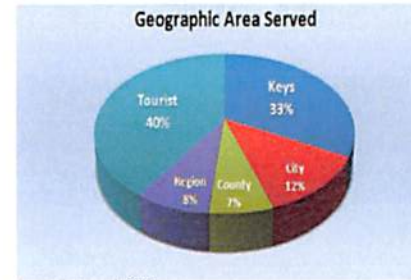
Surveys are also valuable in that they provide a voice for issues that otherwise would be overlooked. For instance, one owner pointed out that many customers are not aware that valet parking is available for all patrons of the Circle, not just restaurant patrons. Another survey noted that some retailers use outdoor umbrellas emblazoned with less than classy beer advertisements. Many problems raised by survey respondents are relatively inexpensive and easy to address. Doing so will provide significant value at low cost and with little effort.

**Competition**

The property owners and merchants feel that the Circle is a unique shopping area and therefore it does not appear to compete with other shopping areas in the City/County.

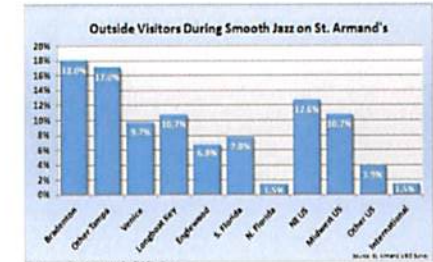
**Sales by Season**

As reported earlier, and confirmed by the surveys, the primary shopping season is winter, which represents 51% of the sales volume.



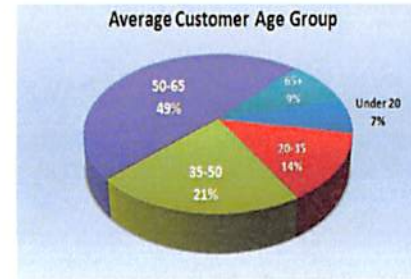
Source: St. Armands BID Survey

Figure 2-12: St. Armands Retail Geographic Market



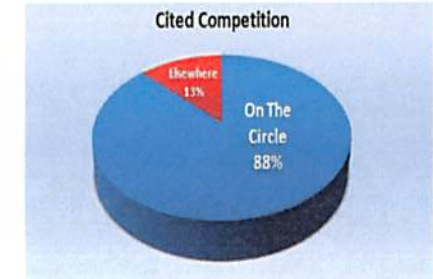
Source: St. Armands BID Survey

Figure 2-15: Special Events Visitors, by Area



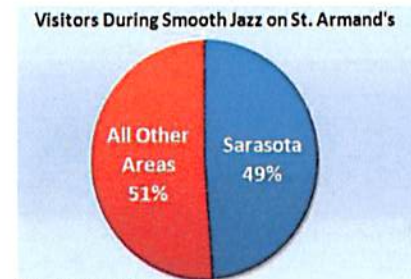
Source: St. Armands BID Survey

Figure 2-13: St. Armands Average Customer Age Group



Source: St. Armands BID Survey

Figure 2-16: St. Armands Competition



Source: St. Armands BID Survey

Figure 2-14: Special Events Visitors



Source: St. Armands BID Survey

Figure 2-17: Sales by Season

**Redevelopment Issues**

As shown in Figure 2-18, the most frequent issue related to redevelopment is parking, followed by appearance, mix of stores, etc.

In order to get a better handle on the multitude of redevelopment options/issues, the Project Team grouped the responses into specific categories as shown in Figure 2-19. When grouped by category, Appearance and general environment of the Circle ranked first at 33%, followed by Parking/Accessibility at 27% and Traffic generation (the need to increase customer traffic) at 25%.

In breaking down the various responses in the Environment & Appearance Master Category, the Circle's general appearance and need for cleanup ranked first at 38%, followed by zoning and signage issues (26%) and Landscape and maintenance (25%). Public facilities, primarily the need for public bathrooms accounted for 11% of the responses.

The major category of parking and accessibility had numerous sub-categories. The need for parking was the most significant at 48%. The rest of the categories were, need for or the problem with employee parking, traffic, need for more valet parking and the turnover of parking spaces.

Responses to Traffic Generation entailed divergent opinions. The largest category felt the Circle's location on the Key while good but due to seasonality, represented some of the current problems. The second largest group of responses dealt with the need to develop anchors and increase the drawing power of the Circle. Lastly, marketing and maintaining the historic and existing brand was viewed as critical.

As shown in Figure 2-23, the mix of merchants response were grouped into the need to increase the upscale retail image of the Circle (65%) and decrease what was perceived to be shabby and cheap merchandise, most notably T-shirt markets.

Table 2-19 provides a detailed summary of all responses.

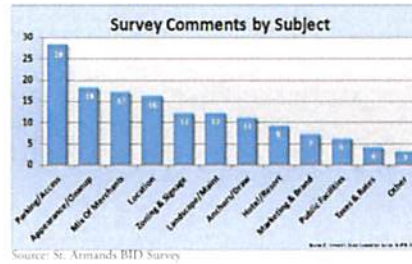


Figure 2-18: Redevelopment Comments by Category

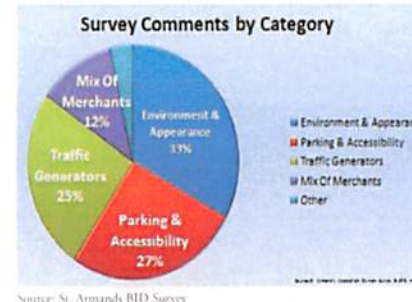


Figure 2-19: Redevelopment Issues

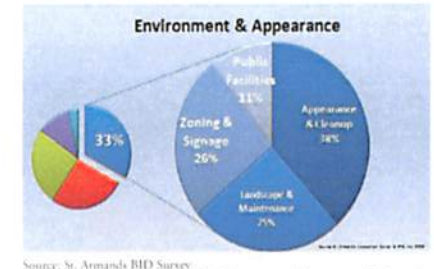


Figure 2-20: Environment and Appearance Sub-Categories

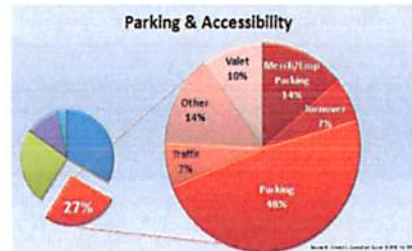


Figure 2-21: Parking and Accessibility Sub-Categories

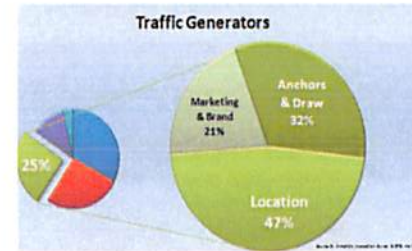


Figure 2-22: Traffic Generators Sub-Categories

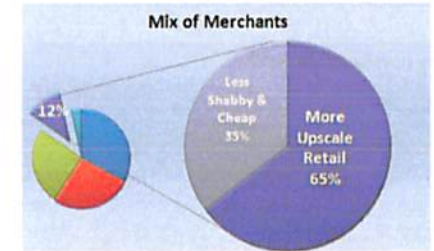


Figure 2-23: Mix of Merchants Sub-Categories

MASTER PLAN OF THE COMMERCIAL TOURIST DISTRICT ON ST. ARMANDS KEY

Survey Comments by Category			
47	38	36	17
<b>Environment &amp; Appearance</b>	<b>Parking &amp; Accessibility</b>	<b>Traffic</b>	<b>Mix Of Merchants</b>
Landscaping	Parking	Location	Mix - Upscale Retail
Landscaping	Parking	Location	Mix - Upscale Retail
Landscaping	Parking	Location	Mix - Upscale Retail
Landscaping	Parking	Location	Mix - Upscale Retail
Landscaping	Parking	Location	Mix - Upscale Retail
Landscaping	Parking	Location - On The Circle	Mix - Upscale Retail
Landscaping	Parking	Location - On The Circle	Mix - Upscale Retail
Landscaping	Parking	Location - Corner	Mix - Shabby
Landscaping - City	Parking	Location - High End	Mix - Shabby
Maintenance - City	Parking	Location - Beach Prox	Mix - Takeout/Icecream
Maintenance	Parking	Location - Pedestrian Traffic	Mix - Takeout/Icecream
Maintenance	Merch/Emp Parking	Location - Pedestrian Traffic	Mix - Cheap Shops
Pedestrian Environment	Merch/Emp Parking	Location - Pedestrian Traffic	Mix - "Lifestyle" Area
Pedestrian Environment	Merch/Emp Parking	Location - Pedestrian Traffic	Mix - Luxury Merchants
Appearance	Merch/Emp Parking	Thoroughfare To Residential	Mix - Quality
Cleanup - Daily	Parking Meters	Thoroughfare By Hotels	Mix
Cleanup	Parking Meters	Anchors - Department Store	Mix
Cleanup	Parking - Nearby	Anchors - Theaters	
Cleanup	Parking - Free	Anchors	<b>5</b>
Cleanup - Litter/Trash	Parking - Adequate	Anchors	<b>Other</b>
Zoning - Eliminate Neon	Traffic	Brand - Tradition	Taxes - Too High
Zoning - Beer Umbrellas	Traffic	Brand - Regional Knowledge	Taxes - Taxes & Bid
Zoning - Enforcement	Valet Parking	Brand - Historically Significant	Taxes - Incommensurate
Zoning - Better	Valet Parking	Brand - Destination	Rental Rates - Too High
Zoning - Looter	Valet Awareness	Events	Stronger Landlords Assoc.
Zoning - Awnings	Trolley Service	Advertising	
Zoning - Awnings	Hotel	"No Reason To Leave"	
Zoning - Awnings	Hotel	(Lifestyle Marketing)	
Zoning - Uniform Signage	Hotel	Amphitheater In Inner Circle	
Zoning - Signage	Luxury Hotel	Better Use Of Inner Circle	
Signage - Too Much	Luxury Hotel	Gourmet Market	
Signage - Too Large	Boutique Hotel	Luxury Fitness Center	
Façades - Upgrade	Boutique Hotel	Luxury Medical Services	
Façades:	Walkable Hotels	Restaurants	
Façades - Assistance	(No Drink & Drive)	Restaurants	
No Public Facilities	Resorts	European Cafes	
No Public Facilities	Water Taxi	Garden Restaurant	
No Public Facilities	Aqua Quadrant Access		
No Public Facilities	Convenience		
Benches			
Music			
Remove The Homeless			
Entrance & Approach			
Better On Circle Reference			
Underground Utilities			
End Of Filmore - Next To Ally			
Café Encroachment			

Source: St. Armands R/O Survey, 2008 & Strategic Planning Group, Inc. 2008

Table 2-19: Survey Comments by Category

MARKET SUSTAINABILITY & FEASIBILITY

Sustainability Problems

The greatest threat to the sustainability of St. Armands Circle is its own obsolescence and changing market conditions; specifically in terms of accessible parking, inadequate wayfinding and fading ambiance.

The majority of customers to the Circle are 59 years old or older. They are less likely to spend time trying to find a parking space or park far from their prime destination. While more parking is available than perceived, it is not easy to find especially for seasonal residents and tourists (who might not be familiar with two prime parking lots), and are the Circle's main market.

Most of the shops on the Circle are at least 40 years old. Moreover, what was considered luxurious in the 1960's is not considered luxurious by today's standards. As it stands now, 68% of the assessed value of the property on the Circle is derived from the value of the land itself. The several-decades-old buildings account for only 32% of the assessed value, on average.<sup>1</sup> Without significant updating, the Circle cannot indefinitely maintain its reputation as a premier shopping destination.

The greatest outside threat to the sustainability of St. Armands Circle is competition from other upscale retail shopping areas. Currently Benderson Development is under construction on a 1.7 million SF, 275-acre, mixed-use development in the southwest and northwest quadrants of Interstate 75 and University Parkway in Sarasota. The development is anchored by The Home Depot, BJ's Wholesale Club, Super Target and Staples. Future retail anchors include: Nordstrom, Kohl's and Fresh Market. Upon completion, University Town Center will include hotels, residential units and office space.<sup>2</sup> This major retail development will boast brand-new infrastructure and amenities and will be only 20 minutes (12.5 miles) from St. Armands Circle. If St. Armands does not commit to a major updating program it could lose some of its market share to University Town Center and other new developments including the emerging CBD.

There is also a major problem with the ownership structure of the Circle. When multiple individuals are responsible for providing a common resource, typically a classic free-rider problem<sup>3</sup> will exist. The common resource benefits all

of the parties involved, but each individual has an incentive to invest less than their fair share into the resource. In the case of St. Armands Circle, each owner has an incentive to invest less than their fair share in common improvements like signage, facades, landscaping, sidewalks, infrastructure and maintenance. It should be noted that the creation of the BID has significantly improved the ability of the property owners to reinvest in the upgrading of the Circle.

Take for example the burying of power lines. Burying power lines increases the aesthetic appeal of the area (creating a more pleasant environment for shoppers, thereby increasing revenue). An undertaking like this would incur very significant costs. The benefit to any one store would not justify the expense were that store to incur all the costs. However, if all the stores split the costs on an equitable basis, then the benefit to each store would be well worth the costs. It would still be worth the costs even if less than 100% of the owners participated. Thus, each owner has an incentive to 'free-ride' and opt out of these kinds of common investments in the hope that the investment will still be made (by everyone else) and the benefit would go to everyone (including the owner who did not pay). However, if too many owners free-ride, the project's benefit-cost ratio falls below 1.0 and will then not be undertaken, to the detriment of all owners.

There is also a free-rider problem with the membership structure of the St. Armands Circle Association. All stores on the Circle benefit from the services provided by the Circle Association, but only members incur the cost of running The Association. Thus, a strong free-rider incentive for all parties involved. The economically rational thing for each individual merchant is to opt out of membership. By doing so they forgo the cost but still benefit from the services. However, if too many merchants opt out of membership, then the Circle Association suffers, and all merchants on the Circle suffer.

Techniques such as not listing non-members on the Circle directory are an attempt to counteract this phenomenon. However, such techniques are limited in their effectiveness. Furthermore, most detrimental effects that such sanctions have on non-member stores are also felt, to a lesser degree, by member stores (i.e. spillover, negative externality). For example, not listing a non-member may result in a potential customer not shopping on the Circle because they didn't see their favorite store listed (because that store is not a member). This is most detrimental to the one,

non-member store, but it is also detrimental to all the other stores on the Circle that the customer would have seen, driven past and walked past to get to that one store.

The Free-Rider Problem is an unsustainable condition that slowly but continually diminishes and destroys the common resource to the detriment of all parties involved. Doing nothing about the problem is not an option that will lead to success. Changing the incentive structures of individual owners and merchants is the only way to counteract these problems. In the case of St. Armands Circle, the major problem is a lack of investment in the common resources (i.e. free-riding, opting out). The most effective way to fix this problem is to make investment (and membership) mandatory. Doing so would increase revenues and increase participation in both the Circle Association and the Owner's Association. Effectively managed, common resources can return more than 100% investment to all investors.

Feasibility Problems

The fractured nature of ownership will be the worst feasibility problem. Convincing 57 people to agree on anything is difficult. It is even more difficult when the consensus involves time, money, property, taxes and design; all of which will be involved in a substantial revitalization master plan.

The optimal solution is consensus on a robust, long-term revitalization plan. However, with such complex subject matter, consensus can be difficult to achieve. Hesitance to move forward without 100% participation is warranted, but can be detrimentally immobilizing. Thus, a careful balance between consensus and progress must be measured. Piecemeal renovation is costlier, less marketable, less attractive, and more difficult to leverage, than comprehensive, all inclusive renovation. Still, any renovation is better than none at all.

One possible solution is to create a legally binding contract (with stiff penalties) among all 57 owners to agree to and follow the St. Armands Master Plan, whatever it may become. Allow for equitable representation of all owners in the decision-making body (perhaps by assessed dollar of owned real-estate). Then make that body's decision mandatory for all owners. Sometimes consensus to do "something" can be easier to obtain than consensus to do a specific set of things.

Another option is to form a coalition of progress-oriented owners and buy out the status-quo preferring owners. Yet another possibility exists in creating consensus among the owners of one particular quadrant, moving ahead with restoration of that quadrant, thereby providing an example of success to motivate the other owners. A last avenue of possibility exists via legal channels through the city government. By working with the city government it is sometimes possible to create ordinances, zoning and legislation to strongly encourage hesitant owners to cooperate with redevelopment plans.

One of those legal channels is via a special assessment district, like the St. Armands Business Improvement District. This district has the authority to effectively tax all of the owners on the Circle. The tax revenues can be increased without 100% participation of owners, and the money could be spent on common improvements. This is effectively a means of making participation in common investments mandatory.

Aside from the physical infrastructure, coordination among retailers is also important in improving the vitality of the retail area. The lack of coordination and management has long been recognized as a problem for retailing. The advantages of centralized management to bring about common operating hours, control of tenant mix, common design themes, and coordinated promotion have been utilized in most successful revitalization strategies.

### Strengths of St. Armands Circle

The Primary Strength of St. Armands Circle is its history and reputation i.e. its "brand". The Circle is a famous shopping area with very strong name recognition, locally, regionally, nationally and even internationally. That fact puts the Circle in elite company, sharing that status with places like Worth Avenue, Paseo Colorado and the Santa Monica Promenade. Reputations can be lost though, and if the Circle allows its brand to degrade, its reputation could quickly change.

Another great strength of the Circle is the elite clientele that occupy the immediately surrounding area (even if they only occupy it a few months per year). As discussed earlier the demographics of St. Armands, Lido and Longboat Keys show the population to be extremely wealthy, white, well-educated and mature. The demographics of The City of Sarasota and Sarasota & Manatee Counties show similar characteristics, albeit to a lesser extreme. Such demographics are perfect for an upscale shopping destination like St. Armands. Moreover, all trends indicate further increases in these characteristics which will only further fuel demand for upscale retail goods and services in the area. The major issue is expanding the shoulder and low summer market. The price points of the Lido and Longboat Keys condo market (in excess of \$1 million without counting furniture/fixtures) makes these units unlikely to be "rented" when not in use by the owners. It is important to increase the number of transit rooms available throughout the year.

The Circle also boasts a relatively good mix of merchants. There is a strong cohort of upscale retail shopping and dining. This cohort attracts a clientele with significant purchasing power and forms a strong foundation for the future of the Circle. There are concerns over the prevalence of lesser-desired T-shirt shops and take-out food outlets; however, their prevalence is neither overwhelming nor permanent, necessarily.

Being oriented as an outdoor shopping area is also a strong advantage of the Circle as the indoor mall is now out of favor with American consumers. In fact, the indoor shopping mall is now so far out of favor that not one will be built in the entire United States during all of 2008 and only three have been built since 2005. This compared to as many as 140 being built each year during the 1990's.<sup>10</sup> For a variety of reasons, American consumers now prefer

outdoor shopping areas, which is exactly what St. Armands Circle offers.

The recent condo building boom near St. Armands Circle will also prove to be advantageous. Many of the new developments are waterfront condos that will be filled with the same upscale clientele as that which already occupies the area surrounding the Circle. The residents of these new condos will provide 87 million additional dollars of retail demand each year. Much of that will be spent at St. Armands Circle. The price points of these CBD units might allow some to be available for non-seasonal use.

Yet another positive factor for the Circle is the fact that retail sales in the area are strong. The most recent data available shows that annual retail spending in the City of Sarasota is above \$18,000 per person. This is well above the state-wide average of \$11,498. Data also indicates a trend of increasing gross retail area and increasing retail rental rates. While this indicates increased competition and an increase in the cost of doing business, respectively, it is also a clear sign of a healthy retail market.

One of the great strengths of the Circle in combating the sustainability and feasibility problems is the existence of the St. Armands Business Improvement District. Many of the Circle's major problems are caused by a lack of investment in common resources due to strong free-rider incentives among its fractured ownership. The Business Improvement District could serve as a method for making investment in common resources mandatory among all Circle owners, effectively eliminating the free-rider problem. Establishing a BID is not necessarily easy; increasing the effectiveness of an already existing BID should be much easier than starting from scratch.

A last strength of St. Armands Circle is that of its location along a major beach-bound thoroughfare of Sarasota residents. The Lido Key beach will be a continual and enduring draw for residents of the Sarasota area. The main means of accessing that beach takes commuters straight through St. Armands Circle. This provides an excellent opportunity for the Circle to capture and convert these many, continual and enduring potential customers.

It should also be noted as a strength of the Circle that The Association has (or had) a very good writer working for them, *exempli gratia*:<sup>11</sup>

Set amidst a tropical paradise, St. Armands is an enchanting circle of fine shops and gourmet restaurants. Renowned as a market place with a continental flavor, it is a charming and graceful synthesis of past and present. Lush tropical plantings, courtyards and patios, antique statuary and contemporary architectural design skillfully contribute to an international atmosphere of friendly warmth, enduring elegance, and timeless style. Relax in the restaurants, explore the shops - from trinkets to treasures, gourmet snacks to candlelight feasts, you'll find it all on St. Armands Circle.

### Weaknesses of St. Armands Circle

#### Market Radius

More than 50% of St. Armands potential market is water. Furthermore, the Circle is not located on or adjacent a major thoroughfare (I-75, US 41 etc.). St. Armands Circle is not really "on the way" to many places (other than the beach and Lido and Longboat Keys). Customers must be very intentional about arriving at St. Armands Circle. The Circle is a destination, and customers need a reason to go there.

#### Lack of Hotels

One of the most cited complaints among owner surveys was a lack of boutique hotels on or near the Circle. On-site hotels provide a natural customer base for retail shopping areas. Hotel visitors often have limited local mobility and limited knowledge of the area in which they are staying. Thus, they are most likely to shop in the area immediately surrounding them. The dearth of hotels on or near the Circle is a serious disadvantage then, relative to other shopping areas.

#### Lack of Anchor

With the loss of Jacobson's the Circle lost its only true retail anchor. Jacobson's was a destination retailer meaning that its unique retailing allowed it to draw permanent Sarasota/Manatee County residents, often residing at a significant distance to the Circle. With its loss, the Circle's primary anchors are its unique restaurants. However, the restaurants market draw is significantly smaller than that of Jacobson's. Currently there is not sufficient space within the Circle to re-create a new true retail anchor, which would need approximately 45,000+ square feet.

ENDNOTES

<sup>a</sup> The supermarket itself is a modern amalgamation of an older system of multiple outlets. Instead of visiting the butcher, the baker and the candle-stick-maker, we now shop at supermarkets that fulfill all those needs in one place.

<sup>b</sup> For example, St. Armands Circle or Tarpon Springs each of which have several first class restaurants that draws from the surrounding region, not necessarily the immediate area. Other examples include Delray Beach, Melbourne, Cocoa Village, Naples Fifth Avenue, etc.

<sup>c</sup> Internationals Council of Shopping Centers Florida Retail Report, Spring 2008, p28

<sup>d</sup> For analytical purposes, it is important to note that this zip code does not include Long Boat Key, which is a major market for Circle retailers.

<sup>e</sup> US Census

<sup>f</sup> Internationals Council of Shopping Centers Florida Retail Report, Spring 2008, p28

<sup>g</sup> Internationals Council of Shopping Centers Florida Retail Report, Spring 2008, p28

<sup>h</sup> Source: [www.aulrealtyadvisors.com](http://www.aulrealtyadvisors.com), March 2007 Sarasota Retail Market Report

<sup>i</sup> A more detailed retail sales table, including selected subsections, is included in the appendix.

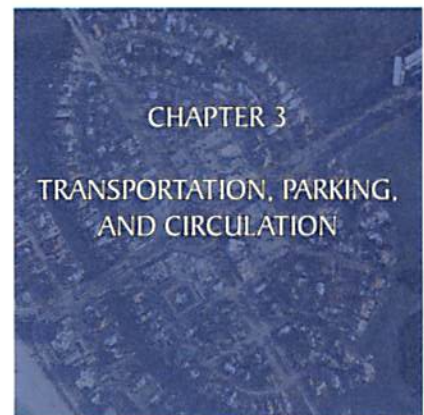
<sup>j</sup> St. Armands Business Improvement District Data, submitted to SPG June 2008.

<sup>k</sup> MarketBeat: Tampa Bay Retail Report, A Cushman & Wakefield Research Publication, 4Q07

<sup>l</sup> The name originates from the classic example of a Trolley with a voluntary fee. Every rider benefits from the trolley's services but has an incentive to pay less than their fair share (or nothing at all), however if too many people pay less than their fair share, the Trolley is no longer feasible and everyone suffers when it ceases to operate.

<sup>m</sup> [Richardson Echo](http://richardsonecho.com). "New Lowe's at former Richardson Square Mall site signals decline of indoor malls", [Andrew Laska](http://andrewlaska.com). Saturday, June 28, 2008

<sup>n</sup> <http://www.starmandscircleassoc.com/about.cfm>, June 2008



CHAPTER 3  
TRANSPORTATION, PARKING,  
AND CIRCULATION

OVERVIEW

Harding Circle Park is the focal point of St. Armands. A traffic circle that surrounds the park provides access and parking for the patrons of St. Armands Circle, but also provides the sole means of connectivity to the Mainland, Lido Key and Longboat Key. The Master Plan addresses the unique role of the Circle.

The sundry storefronts, outdoor plazas and cafes, Harding Circle Park, and rich history contribute to the vitality of St. Armands Circle as a unique destination. The liveliness of a friendly pedestrian environment associated with St. Armands Circle emanates from these features. As St. Armands has developed over the past seventy (70) years, pedestrian circulation has given way to the automobile. The standards for pedestrian comfort and circulation have been reduced. Competition between cars and pedestrians create potential hazards for both.

INVENTORY AND ANALYSIS

Transportation

John Ringling Boulevard serves as the access point to St. Armands Circle for mainland traffic. North Boulevard of the Presidents serves as a secondary access point for traffic arriving to St. Armands Circle from Longboat Key, or Anna Maria Island, or Bradenton. South Boulevard of the Presidents and John Ringling Boulevard (west) direct traffic into the Circle that is configured as a two-lane roundabout. St. Armands Circle absorbs a large amount of through traffic headed to popular destinations in Lido Key and Longboat Key. John Ringling Boulevard (east of the Circle), St. Armands Circle, and North Boulevard of the Presidents are FDOT maintained roadways. Aside from John Ringling Boulevard and the Boulevards of the Presidents, the remaining roadways located on St. Armands Key are primarily residential streets.

Service drives are located at the rear of buildings between stores and parking. Most deliveries and other service functions occur in these back alleys. Some deliveries occur in fronts of buildings, depending on times of day. When deliveries are made to fronts of buildings, trucks use empty parallel parking spaces or temporarily occupy the right lane.

To understand transportation trends at St. Armands, the Project Team conducted seventy-two (72) hour machine counts. The existing counts were adjusted to peak season demand based on the FDOT seasonal adjustment factors. Also, the Project Team conducted peak hour turning movement counts. The existing counts were adjusted to peak season based on the FDOT seasonal adjustment factors. Detailed information regarding the collected data may be found in the Appendix of this plan.

In addition to field-gathered data, community input regarding transportation was included in the Master Plan to help formulate recommendations.

Public Input Regarding Transportation

- Recent traffic calming improvements are acceptable, and have improved safety with neck-outs and speed tables.
- Need high quality traffic calming methods that fit the image of St. Armands.
- Traffic improvements are needed.
- Increase flow with extra walks and lights to bottlenecks.
- Traffic calming could be achieved by lane designation and better signage.

- Traffic lights could be a possibility.
- Breaks in traffic are needed to make turns and cross main roads.
- If water taxi is proposed, it should incorporate Longboat Key, Siesta, restaurants, and Key area stops. Ft. Lauderdale has a water-taxi system with day-long tours. Could be located between Washington Drive and Sarasota Harbor Condos.
- Water taxi dock along John Ringling Causeway or north side acceptable.
- Water taxi is a nice idea for tourists.



Figure 3-1: Vehicular Circulation



- A small frequent shuttle to downtown is plausible.
- A trolley system would only succeed with small busses and many transfer points with frequent schedules.
- Electric cars could transport people from parking to shops.
- It is unclear where parking areas are downtown for park and ride service.
- Trolley could be provided to and from hotels.
- Valet parking is desirable.
- Current beach access is sufficient.

**Parking**

On-street parking provides direct accessibility to businesses, but is limited in quantity. Parking is essential to the economic strength of St. Armands Circle. Both on-street parking and surface parking lots exist in the district. Off-street parking provides the greatest volume and increases efficiency, but is often unsightly. Parking areas must be properly designed, sited, and buffered. Interior landscape islands should be included to provide visual and climatic relief. While a large portion of available public parking is contained within the CT and G zoned areas, a substantial amount exists outside of the district boundaries. Approximately 1,050 publicly accessible free spaces are located within the St. Armands Circle vicinity. Surface lots contain 450 spaces; On-street parallel parking comprises 469 spaces; On-street angled parking comprises 131 spaces. \* Of the 1,050 total spaces, 752 of those spaces are within the CT District boundary; leaving 298 of those spaces outside of the District. All of the 1,050 spaces are contained within a one-quarter mile radius from the center of Harding Circle Park.

The evolving daily and seasonal nature of St. Armands Circle produces a high degree of variation in parking needs. Changes in parking demands occur dependent on time of day as well as time of year. Special events hosted at St. Armands Circle add further variation to the necessity of parking and traffic control. Studies conducted at the onset of the Master Plan estimated parking demand based on the irregularity of St. Armands needs. The study results follow.

The Project Team conducted weekend parking surveys. The counts included all surface parking lots and all on street parking along the following roadways:

- Boulevard of the Presidents between North Washington Drive and South Washington Drive
- John Ringling Boulevard between Washington Drive and Washington Avenue
- Madison Drive between North Washington Drive and North Adams Drive
- Monroe Drive between South Washington Drive and South Adams Drive

Based on these counts, the maximum occupied spaces were 796 at 8:00 p.m. on Friday, 834 spaces at 8:00 p.m. on Saturday, and 650 spaces at 2:00 p.m. on Sunday, as shown in Table 3-2.

The parking surveys were conducted during May, which is outside the peak season for St. Armands that occurs between January and March. To adjust the surveys to the peak season, the existing counts were increased by thirty percent (30%). Table 3-2 illustrates the peak season demand for Friday, Saturday, and Sunday. The maximum demand is estimated to be 1,084 spaces on Saturday.

The Project Team also conducted parking surveys during the St. Armands Smooth Jazz Event. Based on these surveys, the maximum occupied spaces were 1,114 spaces at 8:00 p.m. The Smooth Jazz event also occurred outside the peak season for St. Armands. Therefore, the existing parking demand for this event was increased by twenty percent (20%) to illustrate the peak parking demand during events in peak season.

One of the goals of the Master Plan is to increase the patronage of St. Armands. Therefore, the peak season parking demand was increased by ten percent (10%) to account for the increase in future parking demand with the increase in patronage. As shown in Table 3-6, the parking goal for a typical weekend is 1,200 spaces, while the goal for an event is 1,500 spaces.

	Parallel	Angled	Surface Lot	Totals
Gold	71	0	202 (North)	273
Aqua	76	19	248 (South)	343
Purple	73	32	0	105
Pink	69	16	0	85
Ringling Blvd. Washington to Polk	27	64	0	91
Ringling Blvd. Adams to Washington	29	0	0	29
N. Blvd. of Presidents Madison to N. Washington	37	0	0	37
S. Blvd. of Presidents Monroe to S. Washington	87	0	0	87
<b>Totals</b>	<b>469</b>	<b>131</b>	<b>450</b>	<b>1050</b>

Table 3-1: Available Free Parking

Day	Date	Time	Occupied Spaces	Peak Season Demand <sup>(1)</sup>
Friday	5/30/2008	8:00 p.m.	796	1,035
Saturday	5/31/2008	8:00 p.m.	834	1,084
Sunday	6/1/2008	2:00 p.m.	650	845

<sup>(1)</sup> Assume increase of 30% over May count.

Table 3-2: Parking Demand Normal Surveys

Event	Day	Date	Time	Occupied Spaces	Peak Season Demand <sup>(1)</sup>
Smooth Jazz	Friday	5/23/2008	8:00 p.m.	1,114	1,337

Table 3-3: Parking Demand Event Surveys

Land Use	Size	Parking Rate <sup>(1)</sup>	Required Spaces
Retail	400,000 SF	1 space / 350 SF	1,143 spaces

<sup>(1)</sup> Based on Section VII – 206 (4) of the City of Sarasota Code.

Table 3-4: Code Required Parking

Existing Spaces	Peak Parking Demand – Normal	Peak Parking Demand – Event	Code Requirement
1,050	1,084	1,337	1,143
<b>Deficient</b>	<b>&lt;34&gt;</b>	<b>&lt;287&gt;</b>	<b>&lt;93&gt;</b>

Table 3-5: Parking Demand Summary

Existing Spaces	Peak Parking Goal Normal <sup>(1)</sup>	Peak Parking Goal Event <sup>(1)</sup>
1,050	1,200	1,500
<b>Deficient</b>	<b>&lt;150&gt;</b>	<b>&lt;450&gt;</b>

<sup>(1)</sup> Assume increase of 10% over May count.

Table 3-6: Parking Goal

According to the City of Sarasota, the required number of parking spaces for St. Armands is 1,143 spaces as shown in Table 3-4. This is based on 400,000 square feet of retail space within St. Armands and a parking ratio of 1 space per 350 square feet.

As indicated previously, there are a total of 1,050 parking spaces available for patrons of St. Armands Circle. The goal is to provide 1,200 spaces for a peak season weekend and 1,500 spaces for a peak season event. Therefore, there is currently a deficiency of 150 spaces to meet the peak weekend goal and a deficiency of 450 spaces to meet the peak season event.

The most favorable goal is to provide the required number of parking spaces within the project boundary, therefore an additional 448 spaces would be required beyond the existing 752 spaces to meet the weekend goal and 748 spaces to meet the event goal.

In addition to field-gathered data, community input regarding parking was included in the Master Plan to help formulate recommendations.

**Public Input Regarding Parking**

- Surface lots could be double deck.
- Clean up alleys and parking lots.
- Paid parking should only occur in multi-level parking.
- Improvements to parking would be beneficial: Residents would like more green space buffer.
- Paid parking will move traffic to residential streets.
- Can employee parking be resolved in alleys?
- Multi-level parking could be added in Pink Quadrant with the acceptance of Wachovia.
- Multi-level parking would be necessary with hotel addition.
- Need a friendly pedestrian / parking interface.

- Parking garage should be provided at entrance to circle.
- Need more parking spaces.
- Designated police parking could be for weekends only.
- Addition of office space may be problematic based on City parking requirements.
- Paid parking will hurt retail.
- Valet concessions are desired.
- Parking garage would resolve parking on residential streets.
- Need more free parking.
- Mixed-use development should not be considered until parking is resolved.
- The Filmore lot needs an entrance on South Adams.
- The Resident's Association Report addressed potential parking solutions and is discussed in more detail in the Recommendations portion of this chapter.

**Pedestrian Circulation**

Making the connection between parking and the storefronts is an essential factor to the long-term success of St. Armands. Roadways and walkways interlace through multiple pathways in and around the Circle. After arrival by car, connections to the storefronts are limited. Sidewalks around the perimeter of the surface parking lots lead to the corners. Accessing the Circle from the North (Gold) Quadrant surface parking lot is accomplished through one of three routes.

- The first route brings one to the corner of John Ringling Boulevard and Adams Drive at the south edge of the parking lot.
- The second route carries one to the corner of North Boulevard of the Presidents and Madison Drive.



Figure 3-2: Available Public Parking

- A third path is provided beneath the building (an alleyway) towards the southeast area of the parking lot. This alleyway is not readily apparent and uninviting to pedestrians. The alleyway lacks clear delineation of passage and is dark with several turns and nooks, creating a perceived dangerous situation, and is recommended for closure to the public.

The South (Aqua) Quadrant parking lot also has three routes.

- The first extends to the corner of John Ringling Boulevard and Adams Drive.
- The second leads to the corner of South Boulevard of the Presidents and Monroe Drive.
- The third and most used route occurs along Filmore Drive and terminates at the center of the quadrant.

Furthermore, parking bays are laid out in a fashion where pedestrians must cross multiple bays and parking lanes, or walk in lanes to access perimeter sidewalks. The surface parking lots have few breaks over a large expanse of pavement and provide little shade. The result is an uninviting and unpleasant pedestrian atmosphere.

Traveling to storefronts from parallel parking along medians is even more challenging. Walks are not provided in medians within the District and pose a safety hazard to pedestrians trying to cross at unmarked areas. This occurs at John Ringling Boulevard (both directions) from North Washington Drive to the Circle, North Boulevard of the Presidents (southbound) from Arthur Drive to the Circle, North Boulevard of the Presidents (northbound) from North Adams Drive to the Circle, South Boulevard of the Presidents from South Washington Drive to the Circle, and along the boundary of Harding Circle Park.

Ample crosswalks are provided from the storefronts to the median tips within the District. Decorative crosswalks are provided at each end of the four medians with the exception of the crosswalk on South Boulevard of the Presidents and Monroe Drive. Two entrances into Harding Circle Park are provided at the west and east sides of the park. The crossing to the west crosses two lanes of traffic, while the crossing to the east only crosses one lane of traffic.

Streetscape areas, between the curb and storefronts vary greatly in design and functionality. Some areas within the Circle promote a comfortable walking environment, whereas others do not. Walks and access-ways are often crowded with furniture, trash receptacles, or over-spilling café dining sets. Pavement conditions and lack of accessibility pose further problems.

The City of Sarasota West Area Multi-Use Recreational Trail (MURT) Plan, prepared by PBS&J designates a four-foot (4') on-road bike lane and a ten-foot (10') MURT trail on each side of John Ringling Boulevard, beginning at Bird Key. The trail extends across Coon Key towards St. Armands Circle. At John Ringling Boulevard (east of Circle) and Washington Drive, the designated paths end and signed bike trails loop St. Armands Key in both directions via North Washington Drive and South Washington Drive. At the intersection of South Boulevard of the Presidents and Washington Drive, the signed bike trail extends across the bridge towards South Lido Key. To the west of the Circle, where Washington Drive intersects with John Ringling Boulevard, the on-road bike lane reoccurs on the west bound lanes towards Lido Key, and the MURT trail extends towards the beach through the center of the median.

Improvements to aid pedestrian movement through St. Armands Circle are necessary and should include improving both function and aesthetics. Focus groups voiced concerns regarding pedestrian safety, walkway appearance, bicycle amenities, and sidewalk widths. Recent bulb-outs and median improvements have created pedestrian refuges and greatly improved pedestrian safety. However, St. Armands Circle is still faced with several problematic areas that hinder the functional requirements of friendly pedestrian spaces.

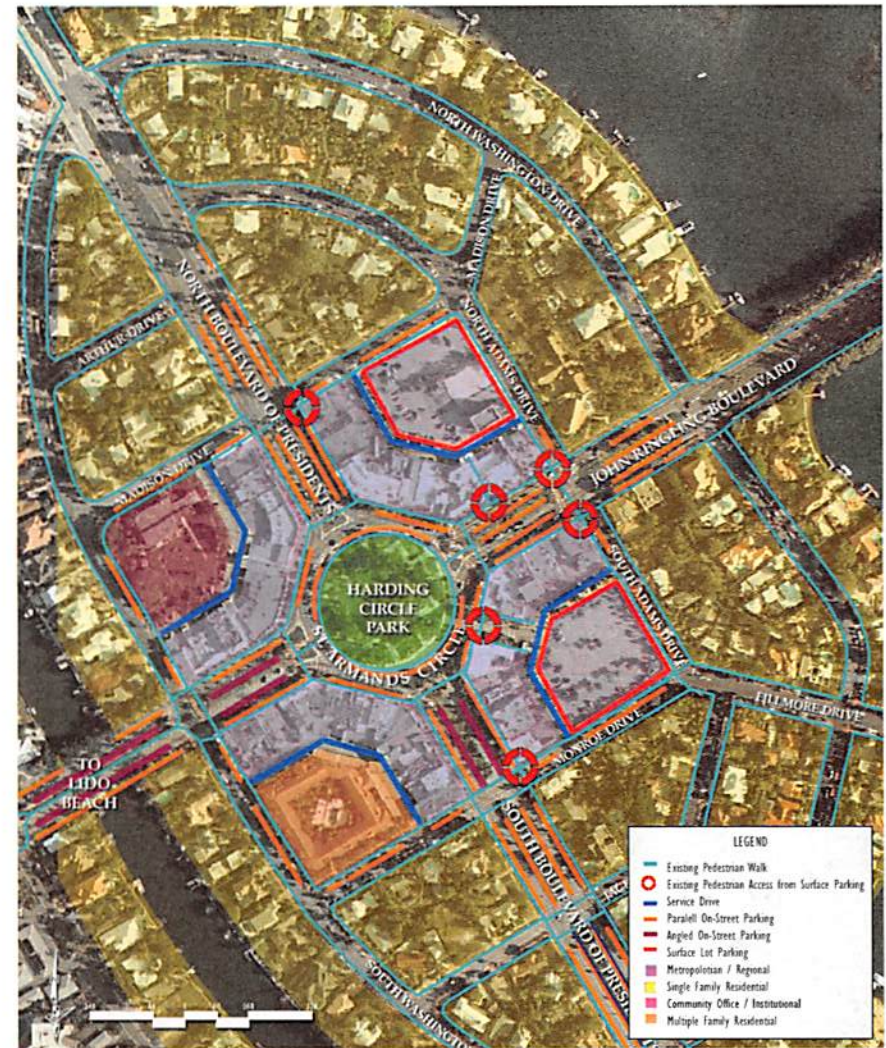


Figure 3-3: Pedestrian Circulation and Relationship to Parking

Public Input Regarding Pedestrian Circulation

- People are encouraged to jay walk from parking adjacent to medians to storefronts.
- Parking bays are laid out in a fashion so that pedestrians often have to cross several bays and multiple parking lanes, or walk in lanes to access perimeter sidewalks.
- Surface parking lots provide little shade over the large expanse of pavement, resulting in an uninviting atmosphere with low aesthetic value.
- Pedestrian routes are unmarked, lacking signs or environmental cues to direct persons to the right path, requiring more attention to safety and navigation resulting in less attention to offered goods and services.
- Cut-through from parking to storefronts are rare, locations of these are unapparent, and uninviting.
- Filmore Avenue provides potential for a pedestrian promenade that connects parking areas to the Circle.
- The existing building cut-through on the east side of the gold quadrant evokes a sense of insecurity due to darkness, sharp turns, and hidden corners.
- The existing building cut-through on the east side of the gold quadrant is hidden and uninviting due to lack of spatial cues that draw a pedestrian to the route and that there is an abundance of unorganized trash bins lining the pedestrian way in the service alley.
- No other cut-throughs are provided in the gold or aqua quadrants.
- Mid-block pedestrian-ways are less important to provide in the pink and purple quadrants in regard to the current land use.
- Lack of accessibility.
- Although a median walkway is provided on John Ringling Boulevard between South Washington

Drive and South Polk Drive (Lido Key), people must walk through plant material, or walk across sod areas to reach sidewalk, which degrades landscape and causes additional landscape maintenance problems.

- Handicap accessible spaces provided along the storefront sides of buildings does not provide adequate space for unloading.
- Walkways are rare from curbside parking along storefront side of street.
- Often walkways and ramps are cluttered with trip hazards such as planters, café furniture, or trash receptacles.
- Pedestrians entering storefronts from westbound curbside parking along John Ringling Boulevard between North Washington Drive and the Circle must traverse across exposed tree roots to reach the sidewalk.
- Pedestrians en route face problems of squeezing by diners and other pedestrians in a limited space because tables and chairs are not always contained in an orderly arrangement.
- Site furniture, advertisement signs, and uncontained café space narrows clear passage areas along sidewalk and forces pedestrians to squeeze by hurriedly.
- Sidewalks in a few areas are badly cracked and produce trip hazards.
- Steep store entrances without handrails make access for elderly or handicapped persons difficult.
- Many intersections do not have crosswalks across main roads at the outskirts of the district which hinders pedestrians safely entering and leaving the district.
- Elements of interest such as, the recently added sculptures lack routes to explore the item further.
- Wide crossings with the exception of recent bulb-out improvements make pedestrians vulnerable to oncoming traffic.



Figure 3-4: Young Girl Window-Shopping



Figure 3-6: Purple Quadrant Sidewalk



Figure 3-5: News Stand at St. Armands



Figure 3-7: Parallel Parking with Restricted Access

- Need bike paths and bike parking areas.
- Maximize the sidewalk space.
- Area is compact so corner entrances from parking seem sufficient. Current access points benefit merchants at ends of Circle by increasing foot traffic.



Figure 3-8: Parallel Parking with Limited Access to Walk



Figure 3-11: Parked Bicycles Create Street Clutter and Pedestrian Obstacles



Figure 3-9: Recently Improved Crosswalk that Aids Pedestrian Safety and Image



Figure 3-12: Sidewalk without Safe Crossing across Roadway



Figure 3-10: Sidewalk Curb (Contained near Building, Uncontained near Street)



Figure 3-13: Gold Quadrant Sidewalk



Figure 3-14: Existing Entrance to North (Gold) Surface Parking Lacks Prominence



Figure 3-15: Existing Rear Facade Lacks Architectural Treatment



Figure 3-17: Unsightly Parking / Service Interface



Figure 3-16: Existing Corner Access Point from North (Gold) Quadrant Parking



Figure 3-18: Existing Corner Access Point from South (Aqua) Quadrant Parking Lacks Prominence

TRANSPORTATION RECOMMENDATIONS

The April 2005 Sarasota / Manatee Water Taxi Feasibility Study Final Report designated a water taxi service for Sarasota and Manatee Counties as a realistic planning goal for the region. The report also identified Mote Marine as a viable location for a waterborne terminal and rates it among the strongest potential hubs. While the study indicates St. Armands as a potential location for a hub in the study, the Project Team believes it is an impractical location due to lack of vacant property, potential negative impacts to residential areas, and environmental restrictions. Renaissance Planning Group recommended that Mote Marine be included in a pilot service route. The Sarasota Parks and Connectivity Master Plan establishes South Lido Beach as an additional hub. Connectivity between hubs and key destinations exemplifies the most essential component to future success of a regional water taxi.

A trolley service integrated with proposed water taxi hubs and service routes could stimulate ridership and expand destinations accessible by water taxi. St. Armands Circle is physically situated to serve as the center of routes between proposed hubs. Past trials of a complimentary trolley bus linking St. Armands Circle to Downtown Sarasota demonstrated unsuccessful patron numbers. A shuttle route exclusive to the St. Armands area Keys would offer short rides, short wait times, frequent trips, and numerous destinations incorporated with a scenic educational / informational tour route. Destinations would include South Lido Park and Nature Center, Coolidge Park, Lido Beach (at the terminus of John Ringling Boulevard), St. Armands Circle, Mote Marine, (Ken Thompson Park, Mote Marine and City Island), and Quickpoint Park. The trolley service should partner with owners of vacation rentals, hotels, and condos to offer this transportation to the Circle. In addition, visitors arriving by water-taxi reduce the number of automobiles on the Circle and associated parking requirements.

Given the location of various hotels in the surrounding area, many of these hotels currently provide transportation to and from the Circle for their guests. There is no designated location for shuttle buses or vans to drop off or pick up patrons. Such a space should be provided, similar to the valet station, directly on the Circle in the parallel spaces. One or two spaces should be sufficient and would require signage to designate the space(s).

PARKING RECOMMENDATIONS

Parking areas must be well lit to ensure safety. People will not use an area at night if they sense danger. Another important safety factor to consider in design includes CPTED (Crime Prevention Through Environmental Design) strategies. Providing appropriate land use buffers requires a balance between screening and safety. CPTED design incorporates a clear window between shrub massings and canopy trees. Large, dense, evergreen plantings should be discouraged in buffers.

Designated pedestrian aisles should also be considered in renewal and new construction parking lot construction. It is optimal for bays to be lined perpendicular to buildings so that pedestrians do not have to cross multiple vehicular lanes. Where feasible, sidewalks should be provided between bays, or at regular intervals. These areas also allow for landscape to be added.

St. Armands faces the difficulty of abutment between public parking areas and service alleys. This relationship creates an unpleasant experience along paths connecting to the storefronts. The concept (following page) proposes alternatives for existing parking and alleyway conditions. This concept suggests reconfiguration of spaces to add buffering between the service drive and main parking area. It also incorporates a walk to direct pedestrians to points of access. The concept illustrates examples of typical improvements that may be considered.

- Add a landscape strip between service drive and main parking. If additional space is needed, compact car parking spaces may be considered. Compact car spaces require an eight (8) feet width by fifteen (15) feet length parking stall, as opposed to the standard nine (9) feet width by eighteen (18) feet length for a twenty-two (22) feet aisle, and eight and one half (8 ½) feet by eighteen (18) feet for a twenty-four (24) feet aisle.
- Gained space allows room for slat fencing with vines, or a hedge row.
- Common and partially enclosed trash disposal areas will organize service drives and alleys. This would require agreement among merchants and among landowners for a specific location.

- Provide enhanced landscape at pedestrian access points. This includes existing and proposed mid-block cut-throughs and corners. Decorative paving may serve as crosswalks across service drive. The pedestrian archway could be incorporated into these areas to help define access points.
- Pedestrian nodes provide spaces for meeting points and information sources. These nodes may contain benches, trash receptacles, lighting, bicycle racks, newsstands, and directories. These areas require a minimum of two hundred twenty-five (225) square feet of well-organized space.
- Landscape islands, the width of one existing space, and the length of one bay could be added. Only two (2) spaces would be lost per landscape island and would greatly enhance the appearance of the parking lot.
- Parking lots may be reconfigured and re-striped to provide interspaced walkways at key locations.
- Each business may require a certain percentage of employees to park in alleyways. Employee parking on the Circle should be prohibited.
- Provide parking access at closest entrances to John Ringling Boulevard of the Presidents to minimize traffic on residential streets. (Specifically in the Aqua (south) quadrant.
- Require merchants to keep service areas clean and orderly. Reinforce maintenance of parking lot landscape and surfaces.

Both short-term and long-term reactions are needed to solve the current and future demands for parking in the Circle. Short-term solutions include reconfiguration of lanes and re-striping to increase additional parking space. Long-term parking solutions will be best resolved by the construction of a multi-level parking structure.

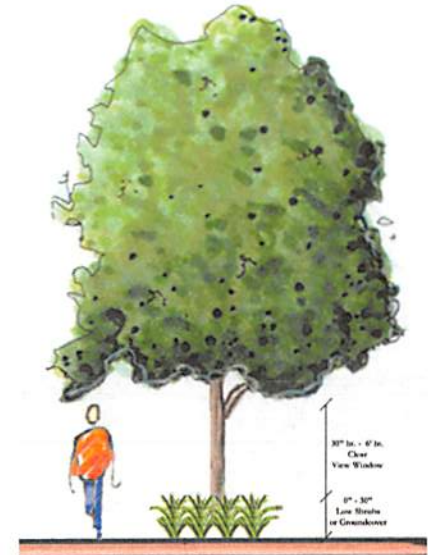


Figure 3-19: Typical CPTED Plantings with View Window



Figure 3-20: Alley Improvement Concept Plan

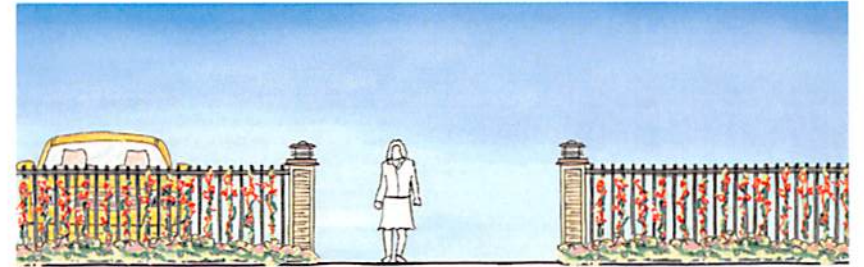


Figure 3-21: Alley Improvement Concept Elevation

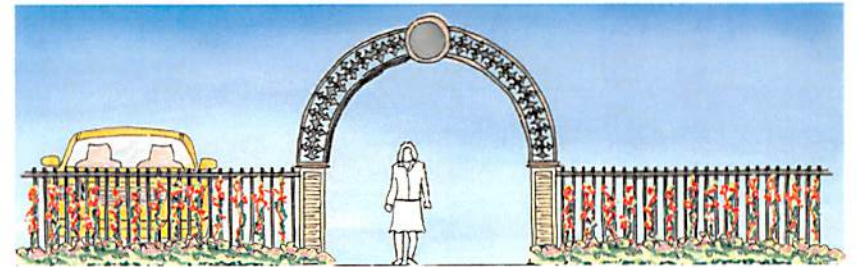


Figure 3-22: Alley Improvement Concept Elevation with Pedestrian Archway



Figure 3-23: Surface Parking Improvement Concept Plan, South (Aqua) Quadrant. Improvements above will result in a net loss of forty-three (43) spaces, but is recommended to improve the function of the lots and the image of St. Armands. This concept has been provided in the case that the G zoned lots will not be developed within a short time frame.



Figure 3-24: Surface Parking Improvement Concept Plan, North (Gold) Quadrant. Improvements above will result in a net loss of twenty-five (25) spaces, but is recommended to improve the function of the lots and the image of St. Armands. This concept has been provided in the case that the G zoned lots will not be developed within a short time frame.

The two (2) parking improvement concepts illustrated below will enhance the St. Armands image. Patrons' first and last impressions are made in these areas of the Circle, and therefore, the appearance of these areas is of utmost importance.



**Temporary Parking – Short-Term Goals**

Currently, event overflow parking is largely accommodated in the median across Coon Key. This temporary parking area is important to accommodate the large quantity of visitors that participate in special events in St. Armands Circle. Due to FDOT regulations, the curbing of the median is a vital step to implementing other desired projects for the Circle. This area is only used in events, and hinders the necessary changes. The Residents Association Report suggested that temporary angled parking in the median could be substituted by parallel parking on the shoulder of John Ringling Boulevard. However, parallel parking on the shoulders will not accommodate the same number of vehicles. More importantly, the shoulders are currently signed "No Parking" and future parking would be subject to FDOT review and approval. Therefore, this plan does not recommend including these spaces as available parking inventory.

The Residents Association Report also recommended other strategies for event parking that included a shuttle service from Lido pool parking lot and presenting high occupancy vehicles (HOV) rewards. Contingent on the acceptance of the Merchants and the Lido Pool management, this opportunity could temporarily relieve parking difficulties during events, but is not a viable long-term solution.

**Permanent Parking – Short-Term Goals**

South Boulevard of the Presidents between Monroe Drive and South Washington Drive is presently two-lanes in each direction with parallel parking on each side. This area has a low traffic flow, and therefore the number of lanes could be decreased from four to two. This would add space to accommodate angled parking along the median. Parallel parking would remain on the exterior of the street where residential drives are not present, as illustrated in Figure 3-25 below. Approximately fifty (50) additional spaces would be gained by implementation of this recommendation.

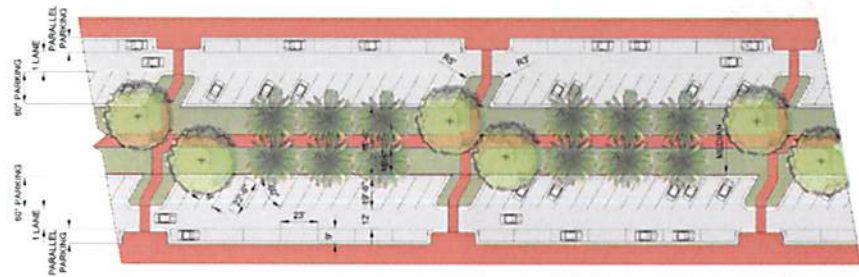


Figure 3-25: Recommendation for Parking along South Boulevard of the Presidents between Washington Drive and Monroe Drive

The Residents Association Report suggests reducing North Boulevard of the Presidents from the existing four lanes between Madison Street and Washington Boulevard to two lanes with on street parking. Part of the justification of this modification is North Boulevard of the Presidents north of Washington Boulevard is two-lanes, and therefore, the existing four-lane section could be reduced to two lanes with parking. It is not recommended that this modification be implemented for the reasons stated below.

The "Level of Service (LOS) D" capacity of the two-lane section of North Boulevard of the Presidents without parking is 1,560 vehicles per hour, as shown in Figure 3-26. Based on the counts conducted by the Project Team, the existing peak hour peak season volumes are below the LOS. The capacity of North Boulevard of the Presidents is shown below. Therefore, this section currently operates at an acceptable level of service with the existing volumes as a two-lane roadway without parking.

The remaining section of North Boulevard of the Presidents is currently four lanes with parking. The Level of Service D capacity for this section of roadway is 2,218 vehicles per hour. Based on the counts conducted by the Project Team, this section of North Boulevard of the Presidents currently operates at an acceptable level of service as a four-lane roadway with parking. If this section were reduced to two lanes with parking, the capacity would be reduced to 1,030 vehicles per hour. Therefore, the subject section would not operate at an acceptable level of service with the existing peak hour peak season traffic if two of the travel lanes were removed.

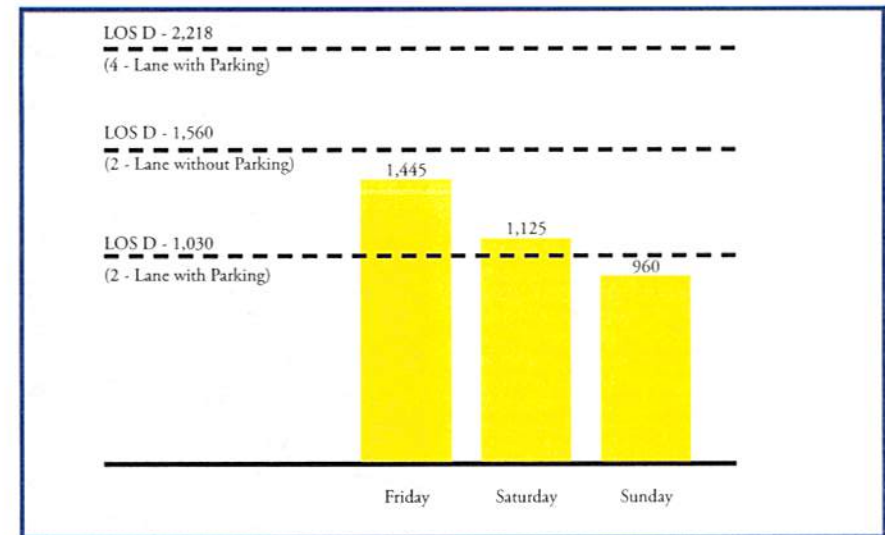


Figure 3-26: LOS D for North Boulevard of the Presidents

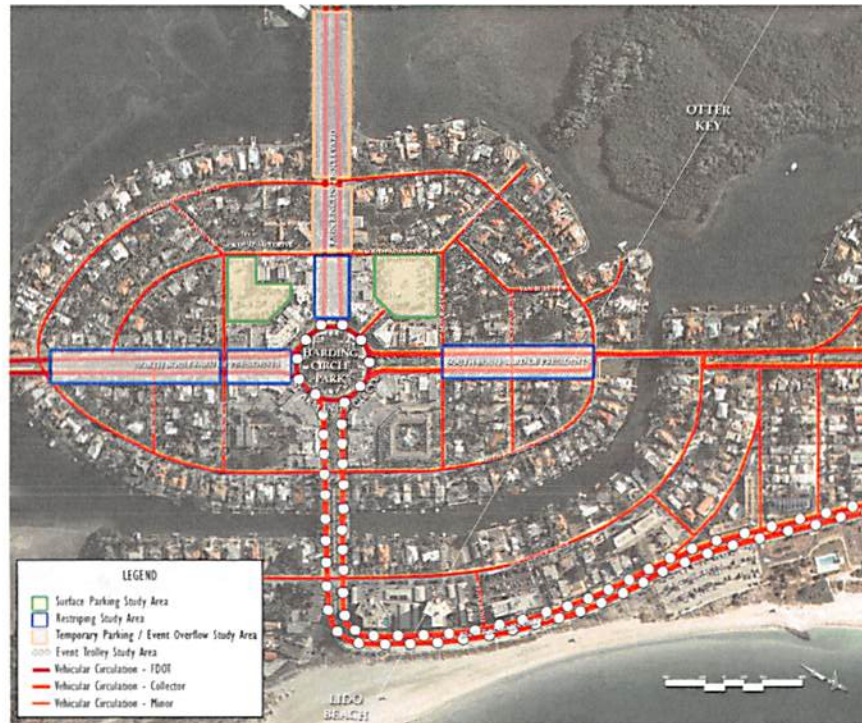


Figure 3-27: Parking Study Areas

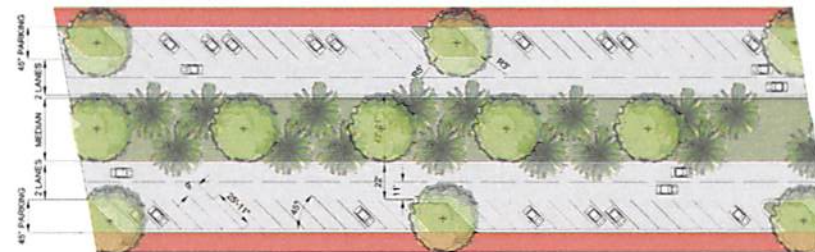


Figure 3-28: Angled Parking with 2 Lanes of Traffic - This was a studied scenario that is **NOT** recommended for John Ringling Boulevard due to Safety Hazards and FDOT Restrictions.

The report also suggested reducing North Boulevard of the Presidents to two-lanes with parking from the Circle to Madison Street. It is not recommended that the modification be implemented for the same reasons as stated previously.

During the process of this Master Plan, John Ringling Boulevard between Adams Drive and the Circle was also evaluated for potential additional surface parking. Figure 3-28 illustrates a typical plan view of eliminating parallel parking on interior and exterior sides of the street, and adding angled parking on the exterior. While this scenario would increase the safety of patrons traveling from parking areas to storefront, it is not recommended due to the required movement of vehicles backing into two lanes of traffic and the likelihood of accidents to occur.

Permanent Parking – Long-Term Goals

Long-term strategies to accommodate parking needs include construction of structured parking on one or both of the South (Aqua) and North (Gold) Quadrants. Presently, the north surface lot in the North Quadrant contains 202 parking spaces, and the south surface lot in the South Quadrant, contains 248 parking spaces. During the preparation of this Master Plan, the City of Sarasota adopted amendments to its Comprehensive Plan that limit building heights within the Circle. The North Quadrant is restricted to forty (40) feet while the South quadrant has a maximum height of thirty-five (35) feet. It is estimated that four (4) levels of parking could be accommodated in thirty-five (35') feet and that five (5) levels could be accommodated in forty (40') feet.<sup>5</sup> The structure heights would be measured above FEMA elevations. The South Quadrant, the larger and more efficient of the two sites, would yield approximately 190 spaces at grade level, and 226 spaces on each additional level. The North Quadrant would yield approximately 106 spaces at grade level and 142 spaces on each additional level.<sup>6</sup> Costs of parking structure construction would be greater in the North Quadrant than the South Quadrant due to the layout of each site.

It is a tenet of the Master Plan that the character of St. Armands be preserved. Therefore, design of a parking structure must follow design guidelines and conform to the St. Armands image. This can be accomplished through use of perimeter arcades and establishing criteria for quality landscape and hardscape design. The façade treatment of a structure is of great importance and available options, as well as precedents should be thoroughly considered.

	Spaces per Level	Totals	Additional Spaces Gained
<b>Ground Level</b>	106	N/A	N/A
<b>Level 2</b>	142	248	46
<b>Level 3</b>	142	390	188
<b>Level 4</b>	142	532	330
<b>Level 5</b>	142	674	472

Table 3-7: Approximate Parking Structure Yield for North (Gold) Quadrant  
Reflects yield based on structured parking only. Does not include any potential surface parking that may be proposed on the lot nor any existing surface parking within lot boundaries that may remain.

	Spaces per Level	Totals	Additional Spaces Gained
<b>Ground Level</b>	190	N/A	N/A
<b>Level 2</b>	226	416	168
<b>Level 3</b>	226	642	394
<b>Level 4</b>	226	868	620

Table 3-8: Approximate Parking Structure Yield for South (Aqua) Quadrant  
Reflects yield based on structured parking only. Does not include any potential surface parking that may be proposed on the lot nor any existing surface parking within lot boundaries that may remain.



Figure 3-29: Parking Structure Architectural Treatment



Figure 3-30: Pedestrian Plaza Space Adjacent to Parking Structure



Figure 3-31: Parking Structure Entrance



Figure 3-32: Parking Structure with Area Historic Architecture

**Pedestrian Connectivity**

St. Armands Circle businesses rely heavily on foot traffic. Therefore it is essential to the long-term strength of St. Armands Circle to employ a pedestrian friendly environment. Vital steps are necessary to eradicate problematic pedestrian issues presently existing in St. Armands Circle. A healthy pedestrian environment can be nourished through a high level of connectivity between pedestrian zones, central pedestrian nodes with pedestrian amenities, ensured safety at pedestrian crossings, and functional and aesthetic treatments to enhance pedestrian comfort.

Typical distances people are willing to walk vary based on how enjoyable the environment as well as the time traveled between points. Typically, in an urban environment, people are willing to walk up to one-quarter mile, or a five-minute walk to their destination. The entire CT District is located within a one-quarter mile radius from the center of Harding Circle Park.

Paths, or channels of movement, may be either strong axes that promote certainty or wandering paths that foster curiosity. Regardless of the path character, interconnected sidewalk systems and thoughtful choices of routes enhance pedestrian use. It is important that walkways are clearly defined and that wayfinding is provided to lead pedestrians along their route of choice, and to their final destination.

Central nodes for pedestrian activity will be located along prominent paths. These nodes may provide pedestrian amenities and help clearly delineate pedestrian routes. Proposed pedestrian-oriented focal points may contain bicycle parking, newsstands, informational and directional kiosks, benches, and trash receptacles. These pedestrian amenities may potentially become transit stops and gathering points.

Pedestrian safety contributes to walkable streets. Presence of traffic calming devices and safe crossings are essential in providing a safe environment. Proposed solutions to improve pedestrian safety include providing connections between on-street parking and storefronts, additional crosswalks at intersections, raised and textured crosswalks, and bulb-outs. Median walkways along with mid-block crosswalks will direct pedestrians through a pleasant environment along the median to the nearest crosswalk and eliminate the enticement to jaywalk. Additional

crosswalks are needed at intersections that do not currently have crosswalks. It is important that pedestrians are given the option and protection to move about the district freely. Raised and textured crosswalks will alert drivers of upcoming change and simultaneously slow traffic. Bulb-outs at major roadway intersections will reduce the distances that pedestrians must travel across traffic.

Perceived pedestrian safety is another important factor to create a successful walkable community. Safety is perceived from paths that are well lit and navigable by knowledge and sight distance to the destination. Additional factors that may reassure pedestrians of their safety include separation of sidewalks by landscaped areas, raised planters, street trees, or on-street parking. Seating areas provide opportunities to rest, linger, imagine, and people watch. Benches should be located so that the user feels safe, secure, and protected. Seating areas should be located in areas that do not suggest vulnerability. Criteria for bench placement should be well lit during nighttime hours and shaded during daytime hours, so that people may relax. Crime Prevention Through Environmental Design (CPTED) provides guidelines for landscape architectural considerations in public places and should be used as a reference guide to specific design.

Additional pedestrian comfort should be provided through an adopted level of service for sidewalks. Sidewalks leading into and away from the District should maintain a five feet width minimum to accommodate pedestrian passing. Sidewalks along storefronts should preserve a continuous six (6) feet width minimum clear zone. Where feasible, a wider standard should be implemented to allow for window-shopping, two or more persons walking together, and improved handicap access. Walkways and ramp areas should be kept clear of street furniture and other obstacles. As streetscape improvements are made, benches, trash receptacles, planters, and other furnishings should have designated sensible locations that respect a clear walking path. All pedestrian areas should be accessible to able-bodied, disabled, and inhibited users. Maximum slopes and grade changes over distances, presence of landings, ramps, handrails, and tactile warning strips should be evaluated in depth and recommendations made to make every corner of St. Armands Circle accessible to all.

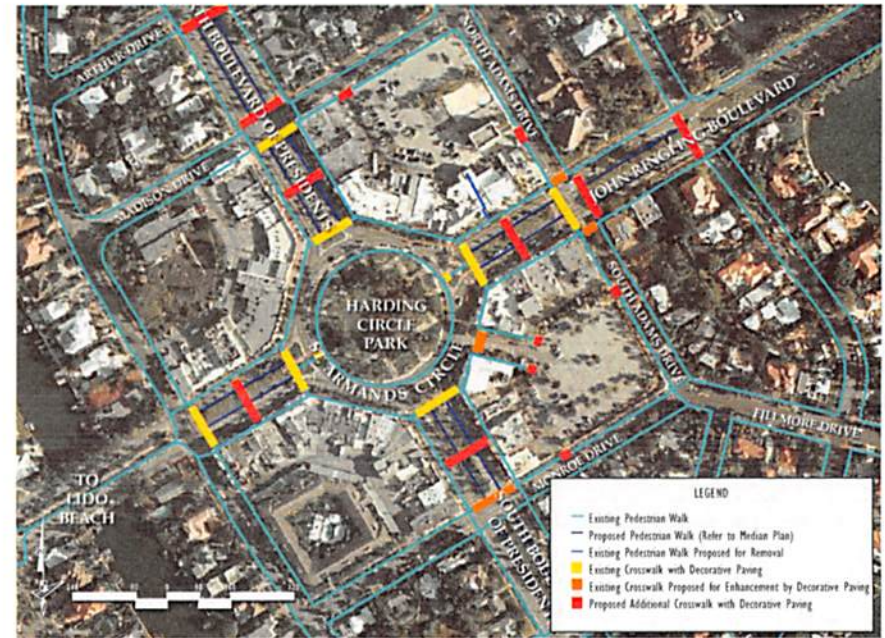


Figure 3-33: Proposed Pedestrian Improvements

ENDNOTES

- (a) The 1050 counted spaces are located along Ringling Boulevard between North Washington Drive and Polk Drive (Lido Key), North Boulevard of the Presidents between North Adams Drive and the Circle, South Boulevard of the Presidents between South Washington Drive and the Circle, South Washington Drive between Monroe Drive and Madison Drive, North Adams Drive between Madison Drive and John Ringling Boulevard, South Adams Drive between Monroe Drive and John Ringling Boulevard, Madison Drive between South Washington Drive and North Washington Drive, Monroe Drive between South Washington Drive and South Adams Drive, the interior and exterior of the Circle, and the two surface parking lots located in the Gold Quadrant and the Aqua Quadrant. Many of the counted parallel spaces are un-striped and therefore counts are approximate. Surface parking lot counts were based on parking lot plans provided by the City of Sarasota Engineering Department.
- (b) To accurately determine height of parking structure, detailed site elevation data is required.
- (c) An accurate survey is required to determine accurate yield numbers of parking structures in each lot. The project team compiled all available sources to make the best conclusion possible in this stage of the process.

An aerial photograph of a city grid, showing streets and buildings, with a semi-transparent blue overlay. The text is centered on the right side of the image.

CHAPTER 4  
DEVELOPMENT  
OPPORTUNITIES

**OVERVIEW**

Redevelopment opportunities on St. Armands are dependent upon economic conditions and opportunities presented to the development community, and implemented through controls placed on property through land use and zoning regulations. Several physical factors limit redevelopment on St. Armands. First is the lack of available land. The obvious choices for "opportunity" are the North (Gold) and South (Aqua) Quadrants. Both quadrants are presently surface parking lots owned by the City of Sarasota and provide the bulk of parking for the Circle. The North Quadrant is located southwest of the North Adams Drive and Madison Drive intersection. There is a proposed new fire station and an existing telephone switching building located on North Adams Drive; both are permanent uses. The redevelopment of the North Quadrant will require creative site planning to accommodate the existing properties. The South Quadrant, located northwest of the Madison Drive and North Adams Drive intersection, poses less of a challenge in terms of site design, and is generally open. However, the residential street presents compatibility challenges that must be respected through creative design.

Another factor that limits redevelopment is the thirty-five foot (35') building height restriction for the South Quadrant and the forty (40) foot limitation on the North Quadrant. This essentially limits site development to a three-story commercial or residential structure or possibly four (4) level parking garage, but a five (5) level parking structure will most likely exceed thirty five (35) feet. During the preparation of this Master Plan, the City of Sarasota adopted these height limitations as an amendment to their Comprehensive Plan. Additional parking on St. Armands is an absolute necessity and cannot be achieved by only re-striping existing on-street parking (refer to Chapter 3 - Transportation, Parking and Circulation).

Development of existing commercial property on the Circle is also viable although it would be limited by the necessity of aggregating several narrow parcels under multiple ownerships – a challenge that could be overcome if the economics are positive. Existing buildings on the Circle are generally fifty to seventy years old and have common walls similar to a typical "main street". A comprehensive redevelopment of contiguous aggregated property would undoubtedly involve completely removing existing structures. There are no restrictions placed on buildings on the Circle in terms of historic preservation, although

a review by the City is recommended. Extensive facade renovations over the years have removed most, if not all, of the original architecture.

Redevelopment and the revitalization of St. Armands includes improvements to the following:

- Transportation Systems (Roadways)
- Surface Parking Renovation
- Gateways and Wayfinding Signs
- Introduction of St. Armands Design Guidelines

Improvements to roadway systems aids in solving parking deficiencies, particularly during events. It will be possible to reconfigure street striping and driving lane areas to add parking without moving curb. Also, improved landscaping, burial of power lines and implementation of passive traffic calming methods all contribute to an improved St. Armands image.

As a temporary measure, renovation to existing surface parking lots should include more effective landscape buffers and CPTED-approved (Crime Prevention Through Environmental Design) fencing around service areas that will eliminate these as eyesores. These improvements will help enhance the St. Armands image.

Pedestrian circulation systems include streetscape improvements on the Circle and accommodations for bicycles. There is no cohesive streetscape design for St. Armands that offers a unified image or brand. Certainly there are sections of the streetscape that are upscale and attractive, but the entire pedestrian streetscape system should be made consistent and further define the St. Armands image.

Gateways to St. Armands are essential to create a "sense of place" and provide an immediate introduction to the St. Armands brand. Wayfinding is woefully inadequate and contributes to problems with vehicular circulation around the circle. The Master Plan includes a detailed description of gateway and wayfinding strategies for St. Armands.

Design Guidelines provide the framework for all issues described above and are the single-most important method for defining the St. Armands brand and image. They

should include building facade improvements, streetscape design and signs.

Diverse building facades provide an eclectic ambience, which provides a sense of separation and individuality. Although the uniqueness of the building facades adds character as a whole, several building facades, and accompanying entrance features create distraction by ignoring the historical context and existing building styles of the Circle.

The Master Plan, through redevelopment and revitalization, will provide the necessary tools to rediscover the St. Armands vision as originally developed by John Ringling eighty years ago. Implementation of the various Master Plan components is essential to the success of the Commercial Tourist ("CT") District Master Plan. An implementation matrix is provided that includes project name and description, source of identified need, responsible party, suggested time frame, capital cost, and potential funding sources.

**IDENTIFICATION OF DEVELOPMENT OPPORTUNITIES**

**Retail Gap Analysis**

A good method for determining the market potential for an area is to analyze the difference between what area residents spend and what retail stores earn, or what is referred to as a "GAP" analysis.

Of particular interest are the department store and grocery store. The Circle was once successfully anchored by a major department store. This gap analysis shows that the opportunity still exists. Many niche gourmet grocery chains such as Whole Foods or Morton's Market have now emerged as successful anchors in several new, particularly mixed-use developments. This Gap Analysis shows that the opportunity exists here as well.

Tables 4-1 and 4-2 on the following page, shows the results of the GAP analysis for three radii around St. Armand's Circle. A positive dollar value, \$, or gap, indicates an opportunity for new retail while a negative dollar value, (\$), or surplus, indicates that the local market is currently supplying more than what the local market can support. This does not necessarily mean there is no opportunity.

For instance, the GAP analysis shows a large surplus in each radius in the Clothing and Clothing Accessories store category. Obviously, many clothing stores in the area do quite well. The large surplus is indicative that those stores must be selling to residents outside its immediate surrounding area, which is quite true of most shopping destinations, including St. Armand's Circle.

The Gap analysis shows several store categories in which there is an opportunity gap, (i.e. the local market alone could provide enough demand to meet supply of a new store in the area). Those that would fit nicely into the St. Armand's atmosphere include the following:

- Department Store
- Grocery Store
- Cosmetics, Beauty Supply & Perfume
- Luggage & Leather Goods
- Florist
- Hobby, Toys & Games

**Economic Development - Programming**

In addition to the results of the retail gap analysis, the Project Team believes it is important to look at redevelopment in terms of economic development; specifically in terms of overall tourism development

**Tourist Development**

The Circle retail structure today is largely dependent on two markets: seasonal residents and tourism.

As discussed, the seasonal market is excellent and with the addition of thousands of new condominium units within its 3-mile market area, this part of its primary market should continue. However, as previously mentioned, this is great for the "season" but due in large part to the price structure of the units, they remain vacant during off-season.

Retail Gap Analysis, Selected Retail Stores, 3 mile Radius, Ranked by Gap

Retail Store Type	Demand (Consumer Expenditures)	Supply (Retail Sales)	Gap or (Surplus)
Supermarkets, Grocery (Ex Conv) Stores-44511	\$ 47,380,487	\$ 16,883,391	\$ 30,497,096
Department Stores Excl Leased Depts-4521	\$ 30,811,064	\$ 962,619	\$ 29,848,445
Household Appliances Stores-443111	\$ 2,166,606	\$ 495,706	\$ 1,670,900
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$ 1,292,719	\$ 24,661	\$ 1,268,058
Hobby, Toys and Games Stores-45112	\$ 2,414,991	\$ 1,238,653	\$ 1,176,338
Prerecorded Tapes, CDs, Record Stores-45122	\$ 765,179	\$ 5,889	\$ 759,290
Special Foodservices-7223	\$ 3,747,373	\$ 3,087,581	\$ 659,792
Florists-4531	\$ 1,258,916	\$ 630,531	\$ 628,385
Luggage and Leather Goods Stores-44832	\$ 351,176	\$ -	\$ 351,176
News Dealers and Newsstands-451212	\$ 121,438	\$ -	\$ 121,438
Men's Clothing Stores-44811	\$ 1,060,322	\$ 1,008,648	\$ 51,674
Clothing Accessories Stores-44815	\$ 484,443	\$ 768,790	\$ (284,347)
Childrens, Infants Clothing Stores-44813	\$ 749,667	\$ 1,528,731	\$ (779,064)
Optical Goods Stores-44613	\$ 1,042,393	\$ 2,098,217	\$ (1,055,824)
Home Furnishing Stores-4422	\$ 7,797,362	\$ 9,145,323	\$ (1,347,961)
Drinking Places -Alcoholic Beverages-7224	\$ 2,297,698	\$ 4,525,191	\$ (2,227,493)
Other Health and Personal Care Stores-44619	\$ 2,226,917	\$ 4,556,838	\$ (2,329,921)
Other Clothing Stores-44819	\$ 1,056,331	\$ 7,419,817	\$ (6,363,486)
Shoe Stores-4482	\$ 2,723,738	\$ 9,090,949	\$ (6,367,211)
Beer, Wine and Liquor Stores-4453	\$ 3,728,005	\$ 10,759,754	\$ (7,031,749)
Specialty Food Stores-4452	\$ 1,586,939	\$ 11,882,544	\$ (10,295,605)
Pharmacies and Drug Stores-44611	\$ 29,457,968	\$ 47,331,334	\$ (17,873,366)
Limited-Service Eating Places-7222	\$ 19,281,451	\$ 39,420,813	\$ (20,139,362)
Family Clothing Stores-44814	\$ 8,710,597	\$ 28,959,045	\$ (20,248,448)
Jewelry, Luggage, Leather Goods Stores-4483	\$ 5,278,513	\$ 26,886,886	\$ (21,608,373)
Jewelry Stores-44831	\$ 4,927,335	\$ 26,886,886	\$ (21,959,551)
Full-Service Restaurants-7221	\$ 21,344,988	\$ 47,114,402	\$ (25,769,414)
Women's Clothing Stores-44812	\$ 4,003,843	\$ 33,296,259	\$ (29,292,416)
Clothing Stores-4481	\$ 16,065,203	\$ 72,981,289	\$ (56,916,086)
Clothing and Clothing Accessories Stores-448	\$ 24,067,454	\$ 108,959,125	\$ (84,891,671)

Source: Claritas Data 2008, Sarasota City Planning Department, US Census & The Strategic Planning Group, Inc. 2008

Table 4-1: Retail Gap Analysis, 3-Mile Radius

Retail Gap Analysis Results, Selected Retail Stores, Ranked by 3 Mile Radius Gap

Retail Store Type	3 mile	5 mile	10 mile
Supermarkets, Grocery (Ex Conv) Stores-44511	\$ 30,497,096	\$ 30,305,224	\$ (186,736,004) \$\$\$
Department Stores Excl Leased Depts-4521	\$ 29,848,445	\$ 18,958,445	\$ (390,900) \$\$\$
Household Appliances Stores-443111	\$ 1,670,900	\$ 2,596,252	\$ (4,979,925) \$\$\$
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$ 1,268,058	\$ 1,561,176	\$ 5,832,241 \$\$\$
Hobby, Toys and Games Stores-45112	\$ 1,176,338	\$ 4,366,718	\$ 11,355,802 \$\$\$
Prerecorded Tapes, CDs, Record Stores-45122	\$ 759,290	\$ (232,608)	\$ 2,364,570 \$\$\$
Special Foodservices-7223	\$ 659,792	\$ 2,056,736	\$ 19,810,134 \$\$\$
Florists-4531	\$ 628,385	\$ 989,694	\$ 1,414,036 \$\$\$
Luggage and Leather Goods Stores-44832	\$ 351,176	\$ 940,253	\$ 3,214,224 \$\$\$
News Dealers and Newsstands-451212	\$ 121,438	\$ 369,097	\$ 1,175,816 \$\$\$
Men's Clothing Stores-44811	\$ 51,674	\$ (5,456,234)	\$ (4,429,319) \$
Clothing Accessories Stores-44815	\$ (284,347)	\$ (832,027)	\$ (2,119,249)
Childrens, Infants Clothing Stores-44813	\$ (779,064)	\$ (838,926)	\$ 2,570,482 \$
Optical Goods Stores-44613	\$ (1,055,824)	\$ (5,359,770)	\$ (9,511,347)
Home Furnishing Stores-4422	\$ (1,347,961)	\$ (45,938,120)	\$ (126,864,560)
Drinking Places -Alcoholic Beverages-7224	\$ (2,227,493)	\$ (16,932,724)	\$ (19,087,624)
Other Health and Personal Care Stores-44619	\$ (2,329,921)	\$ (8,239,764)	\$ (29,127,481)
Other Clothing Stores-44819	\$ (6,363,486)	\$ (11,622,367)	\$ (18,168,213)
Shoe Stores-4482	\$ (6,367,211)	\$ (4,278,443)	\$ (8,342,457)
Beer, Wine and Liquor Stores-4453	\$ (7,031,749)	\$ (13,359,951)	\$ 160,369 \$
Specialty Food Stores-4452	\$ (10,295,605)	\$ (9,260,102)	\$ (3,587,208)
Pharmacies and Drug Stores-44611	\$ (17,873,366)	\$ (35,253,595)	\$ 9,632,696 \$
Limited-Service Eating Places-7222	\$ (20,139,362)	\$ (21,130,288)	\$ 5,641,748 \$
Family Clothing Stores-44814	\$ (20,248,448)	\$ (50,504,941)	\$ (98,541,090)
Jewelry, Luggage, Leather Goods Stores-4483	\$ (21,608,373)	\$ (26,657,237)	\$ (16,152,943)
Jewelry Stores-44831	\$ (21,959,551)	\$ (27,597,491)	\$ (19,367,166)
Full-Service Restaurants-7221	\$ (25,769,414)	\$ (50,737,535)	\$ (199,568,742)
Women's Clothing Stores-44812	\$ (29,292,416)	\$ (56,037,993)	\$ (52,287,707)
Clothing Stores-4481	\$ (56,916,086)	\$ (125,292,487)	\$ (172,975,097)
Clothing and Clothing Accessories Stores-448	\$ (84,891,671)	\$ (156,228,168)	\$ (197,470,496)

Source: Claritas Data 2008, Sarasota City Planning Department, US Census & The Strategic Planning Group, Inc. 2008

Table 4-2: Retail Gap Analysis Results



Given the "brand" of Sarasota and its excellent beaches, there appears to be a shortage of lodging facilities. The Circle, and the City should be working closely with the Tourist Development Council (TDC) to promote more transit lodging facilities.

**Boutique Hotel**

One of the most cited requests by survey respondents was the need for a boutique hotel at the Circle. As mentioned earlier, hotels have the ability to help fill the seasonal gap caused by the high valued condo market that remain vacant off-season. The immediate market area lodging industry is limited; although hotels like the Ritz have a tremendous positive impact on the Circle.

**Vacation Packages**

Hotels often offer their services as part of promotional deals, discounts and travel packages arranged by travel agencies and visitors bureaus. Including St. Armand's Circle in those types of packages would draw valuable business to the Circle. For example, gift cards, coupons and advertising for St. Armands circle could be included in "Summer Getaway" packages. Or the same resources could be included in "all inclusive" packages that include hotel, meals, entertainment and shopping at St. Armands Circle.

**Tamplando Tourism**

A growing number of tourists from the Tampa and Orlando areas are choosing to visit St. Armands Circle and the Sarasota Area. There is potential to capture a significant portion of this new market, if they can stay overnight. A particularly beneficial aspect of Tamplando tourists is that their tourist season is not necessarily winter (although 2007 visitor data suggest that the in Florida resident visitor market is increasing in the winter season). Marketing packages could be targeted at this audience and timed to help offset the off-season doldrums.

**Beach Bound Traffic**

St. Armands Circle is perfectly located in the middle of the corridor between mainland Sarasota and the beaches of Lido Key. A number of hotels on the mainland shuttle their customers from their hotel to the beach. This presents an opportunity to capture these potential customers, and promote more lodging facilities.

**Growth in the 10-mile radius population**

In addition to the building boom within a 3-mile radius of St. Armand's Circle, there has also been significant growth in the 10-mile radius population. These new households will present increasing opportunities for St. Armand's Circle to capture these retail dollars if marketed.

**Business Improvement District (BID)**

To paraphrase the City's webpage, the St. Armand's Business Improvement District, was created in 2006 as a dependent taxing authority with the power to levy up to two mills, with City Commission [sic] approval, for the purpose of purchasing supplemental services (maintenance, security, sanitation, promotions, infrastructure and capital improvements).

The boundaries of the BID are made up of all parcels of real property located within the CT Zone District in the vicinity of St. Armands Circle.<sup>78</sup> St. Armand's Business Improvement District's Mission Statement is "to enhance the surrounding and promote the charm of St. Armand's Circle."

The BID program is designed to give property owners and merchants the greatest amount of flexibility in developing their respective local management programs. The success of BID is based upon maximum local support and participation. Local concern for the future of their retail, commercial, and industrial districts is the guiding principle behind the services offered within each particular BID District Plan.

The BID has obtained an unsecured, bank line of credit in the amount of \$600,000 to be used for capital improvement projects and to be repaid annually over the life of the BID. The BID will terminate on Dec 31, 2012 unless re-approved by referendum. At termination, the BID is obligated to discharge all debt and outstanding loans and has provided a principal pay down schedule to accommodate this date. Given that 2012 is only four years away, it is recommended that the BID be extended.

**St. Armand's Special Assessment District (Parking Lot Bond)**

Prior to establishing the BID, the Circle property owners working with the City created a special assessment district in 1994 to purchase property on Fillmore Avenue for additional parking for the businesses located on St. Armand's Circle. A Bond was issued for \$1,795,000 in order to purchase the property, with the principal and interest on the bond being paid by the St. Armands Circle property owners over a twenty (20) year period

**RECOMMENDATIONS**

The single most difficult aspect of the revitalization of St. Armand's Circle will be the organization of the decision makers.

Show the City how investing in the Circle will yield long-term fiscal benefits as property values rise (by raising ad-valorem tax revenues, franchise fees, etc.). If budgets are too tight, show how small, incremental investments can be leveraged and inspire and encourage other investment in the Circle (e.g. matching grants, phased development etc.).

Create a legally binding contract (with stiff penalties) among all fifty-seven (57) owners to agree to and follow the St. Armand's Master Plan, whatever it may be. Allow for equitable representation of all owners in the decision-making body (perhaps by assessed dollar of owned real-estate), but make that body's decision final and mandatory for all owners.

If space could be made available seek one or all of the following:

- A small upscale national retail department store that would act as an end-destination retail anchor and draw customers from the entire MSA.
- A boutique hotel. Additional lodging facilities should create an increase in off-peak seasonal traffic
- An Upscale Grocer, like Whole Foods or Fresh Market. Niche gourmet grocery chains such as Whole Foods or Morton's Market have emerged as prototypical anchors.

There is very little vacant land on which these uses could be developed. The two surface parking lots are the prime location for any future development, however, the resulting loss of spaces would need to be recaptured. An ideal scenario would be to combine the retail use, or hotel, with structured parking thus achieving two goals of the Master Plan.

The following general chart is included to assist in understanding the range of redevelopment options that are used nationally, the degree of implementation difficulty and relative importance of options.

Target Sites for Redevelopment:  
Aqua and Gold Quadrants

The primary deficiency of St. Armands that hinders redevelopment is available parking. The problem is further exacerbated by inadequate wayfinding. Visitors simply cannot efficiently locate the large surface parking lots on the South (Aqua) and North (Gold) Quadrants. The South and North Quadrants however, offer the opportunity to meet present and future parking needs through the construction of a multi-level parking structure. Several proposals have been submitted for redevelopment of the two quadrants. Most prominent are the construction of a hotel on each. Height restrictions may limit the viability of this type of project if it is limited to three (3) floors. The Aqua Quadrant hotel proposal included one hundred seventy-five (175) rooms and a parking structure. It was designed above the height limit and will require a City of Sarasota Comprehensive Plan Amendment revision to proceed. The North Quadrant hotel proposal included one hundred forty-five (145) rooms and associated parking. The North Quadrant proposal met the CT District height restrictions as a four (4) floor complex with the ground floor starting below grade. Each proposal was presented as a conceptual plan and neither proposal has been approved for construction at the time of this Master Plan.

For the purpose of the Master Plan, we are presenting various proposals for each of the quadrants that have been accepted through the public involvement process and meet the need for economic development and additional public parking. The various scenarios are interchangeable for each, and only vary in the number of parking spaces achievable within the constraints of the parcel shape. The Aqua Quadrant provides greater efficiency in site planning due to its relatively square shape. The Gold Quadrant is somewhat "L" shaped and must wrap around an existing telephone switching building and proposed fire station. However, careful attention to site design may provide similar results in useable building volume and parking spaces. It is not the intention of this Master Plan to reiterate or support either development proposal. The purpose of the Master Plan is to demonstrate the developable volume of each site and suggest a program for development that meets the following needs:

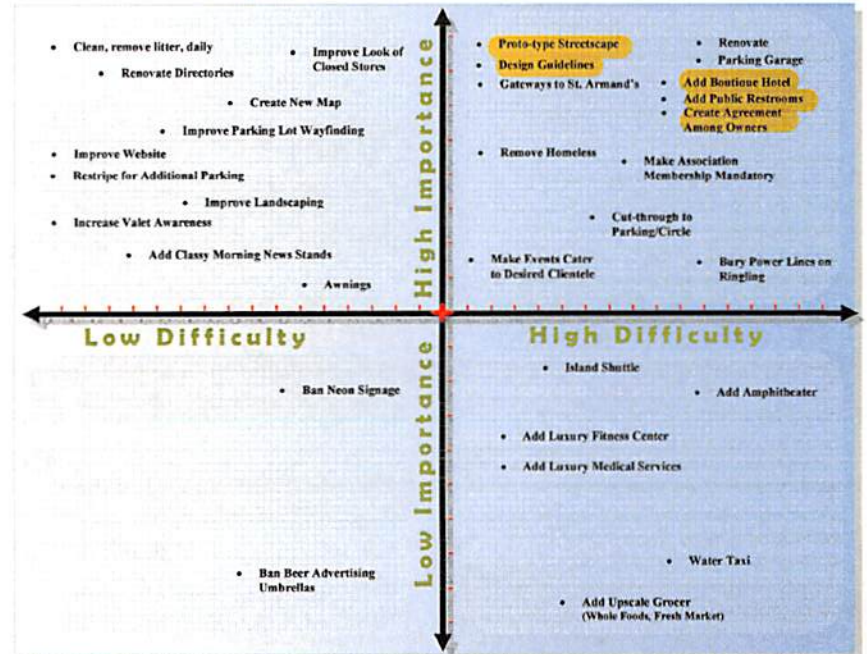
- Economically supportable as described in Chapter 2 – Market Analysis
- Follows regulatory restrictions of the "CT" and "G" zoning districts, and the City of Sarasota Comprehensive Plan
- Has achieved consensus with the LMR
- Meets present and future parking needs for St. Armands

An alternative to constructing two (2) parking structures at two or three levels each which would most likely be cost prohibitive, would be to utilize one of the potential development sites for a combination of structured parking and a retail use. Redevelopment of St. Armands is not limited to the construction of a single level or double level parking structure that has no other shared use. As stated in Chapter 2 - Market Analysis, the following redevelopment opportunities were presented:

- Anchor Retail
- Boutique Hotel
- "Urban" Grocery

Each of these could be constructed on either South (Aqua) or North (Gold) Quadrant and would severely limit the construction of a viable and useful parking structure. If revitalization is to proceed, simply adding a parking structure does not provide the necessary economic stimulus to prevent the continuing decline of St. Armands. It is important to note that this decline will also affect residential property values. It is apparent that the proper redevelopment scenario is construction of structured parking on the North Quadrant that meets the forty foot (40') requirement and "reserving" the South Quadrant for redevelopment as recommended by the project team. Also, additional public parking must be provided as part of the Aqua project scenarios to account for the displacement of existing surface parking. Therefore any redevelopment of the South Quadrant will require detailed scrutiny by the St. Armands community and the City of Sarasota to reduce visual impacts on adjacent residential use.

Recommendations Matrix



Strategic Planning Group, Inc



Figure 4-1: Recommendations Matrix

AQUA QUADRANT - CONCEPT A

Structured Parking

- Provide additional on-street parallel parking along surrounding streets through re-stripping and vehicular lane width reductions on South Adams Drive and Monroe Drive
- Improve service alleys.
- Enhance landscape including buffers along street and at service alley.
- St. Armands "brand" streetscape on adjacent streets.
- Provide public restrooms and information kiosks within parking structure.

Aqua Quadrant - Concept A	
	Spaces
Existing Surface Lot	248
Proposed Structured - Grade Level	190
Proposed Structured - Level 2	226
Proposed Structured - Level 3	226
Proposed Surface Lot	0
<b>Total Proposed</b>	<b>642</b>
<b>Gain (Above / Below Existing)</b>	<b>394</b>
Increased Need = 0 sf retail	0
<b>Net Gain</b>	<b>394</b>



Figure 4-2: Aqua Quadrant Concept A

AQUA QUADRANT - CONCEPT B

Structured Parking with Retail Perimeter

- Provide additional on-street parallel parking along surrounding streets through re-striping and vehicular lane width reductions on South Adams Drive and Monroe Drive
- Improve reserved employee parking.
- Enhance landscape including buffers along street and at service alley.
- St. Armands "brand" streetscape on adjacent streets.
- Provide public restrooms and information kiosks within parking structure.
- Provide additional retail opportunity.

Aqua Quadrant - Concept B	
	Spaces
Existing Surface Lot	248
Proposed Structured - Grade Level	95
Proposed Structured - Level 2	226
Proposed Structured - Level 3	226
Proposed Surface Lot	27
<b>Total Proposed</b>	<b>574</b>
<b>Gain (Above / Below Existing)</b>	<b>326</b>
Increased Need = 35,700 sf retail	102
<b>Net Gain</b>	<b>224</b>

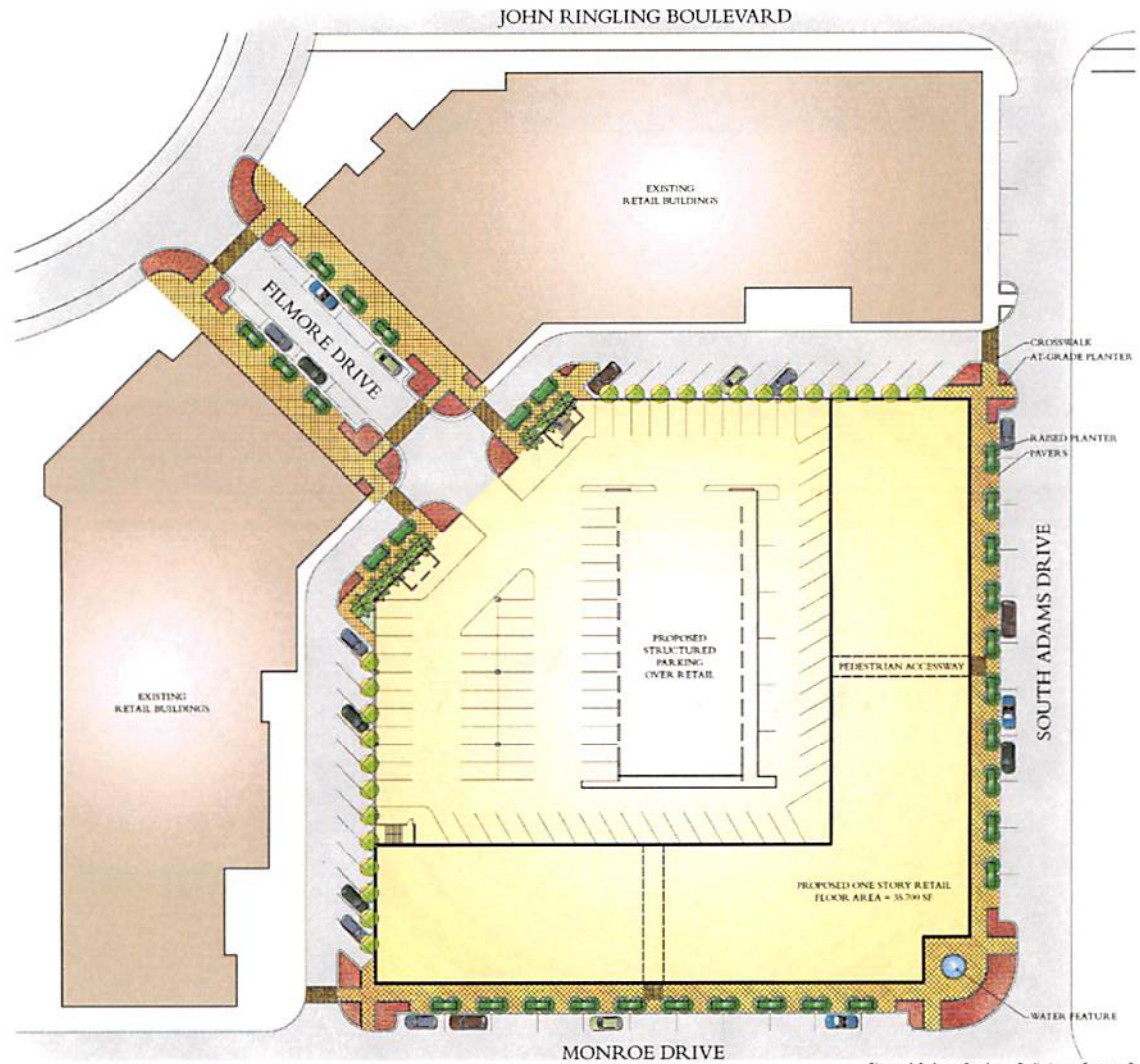


Figure 4-3: Aqua Quadrant Preliminary Concept B

AQUA QUADRANT - CONCEPT C

Structured Parking with Retail Terminus

- Provide additional on-street parallel parking along surrounding streets through re-stripping and vehicular lane width reductions on South Adams Drive and Monroe Drive.
- St. Armands "brand" streetscape on adjacent streets, and corner plaza.
- Parking structure spans extension of Filmore Drive.
- Landscape buffers along street and service alley.
- Provide public restrooms and information kiosks within parking structure.
- Provide additional retail opportunity.

Aqua Quadrant - Concept C	
	Spaces
Existing Surface Lot	248
Proposed Structured - Grade Level	148
Proposed Structured - Level 2	148
Proposed Structured - Level 3	157
Proposed Surface Lot	0
<b>Total Proposed</b>	<b>453</b>
<b>Gain (Above / Below Existing)</b>	<b>205</b>
Increased Need = 48,000 sf retail	137
<b>Net Gain</b>	<b>68</b>

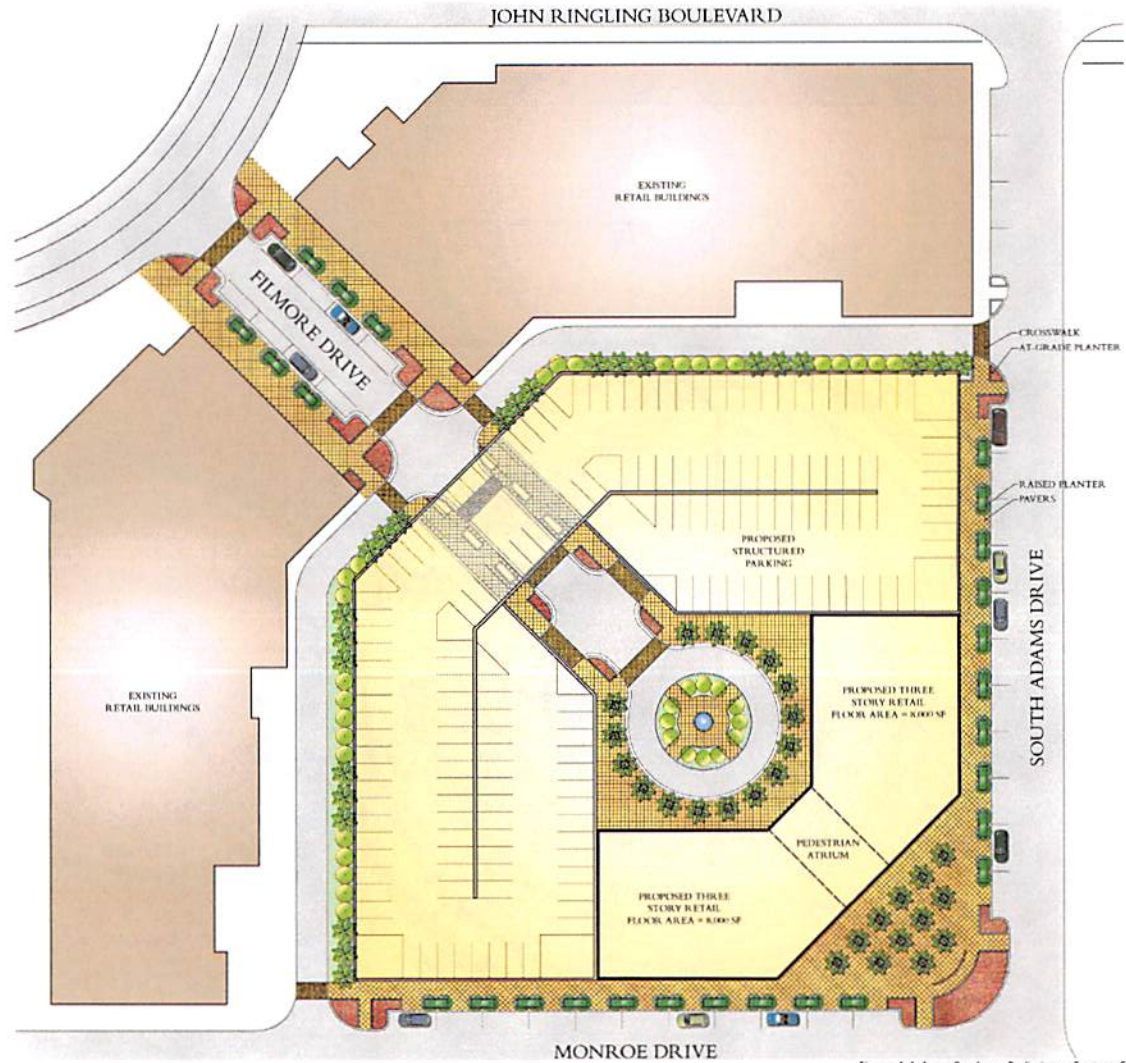


Figure 4-4: Aqua Quadrant Preliminary Concept C

AQUA QUADRANT - CONCEPT D

Structured Parking with Entry Retail

- Provide additional on-street parallel parking along surrounding streets through re-stripping and vehicular lane width reductions on South Adams Drive and Monroe Drive.
- Enhance landscape including buffers along street and at service alley.
- St. Armands "brand" streetscape on adjacent streets.
- Provide public restrooms and information kiosks within parking structure.
- Provide additional retail opportunity.

Aqua Quadrant - Concept D	
	Spaces
Existing Surface Lot	248
Proposed Structured - Grade Level	70
Proposed Structured - Level 2	156
Proposed Structured - Level 3	190
Proposed Surface Lot	
<b>Total Proposed</b>	<b>416</b>
<b>Gain (Above / Below Existing)</b>	<b>168</b>
Increased Need = 18,000 sf retail	51
<b>Net Gain</b>	<b>117</b>

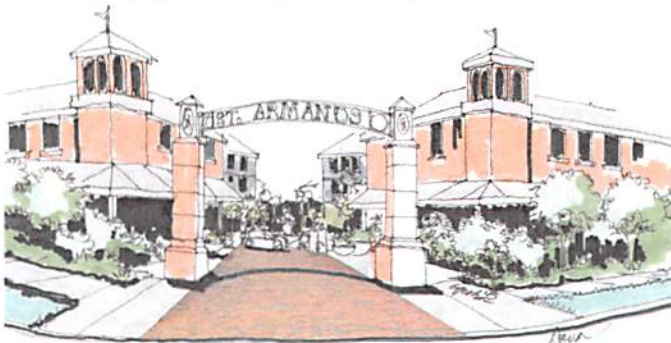


Figure 4-5: Conceptual Filmore Entrance from Circle

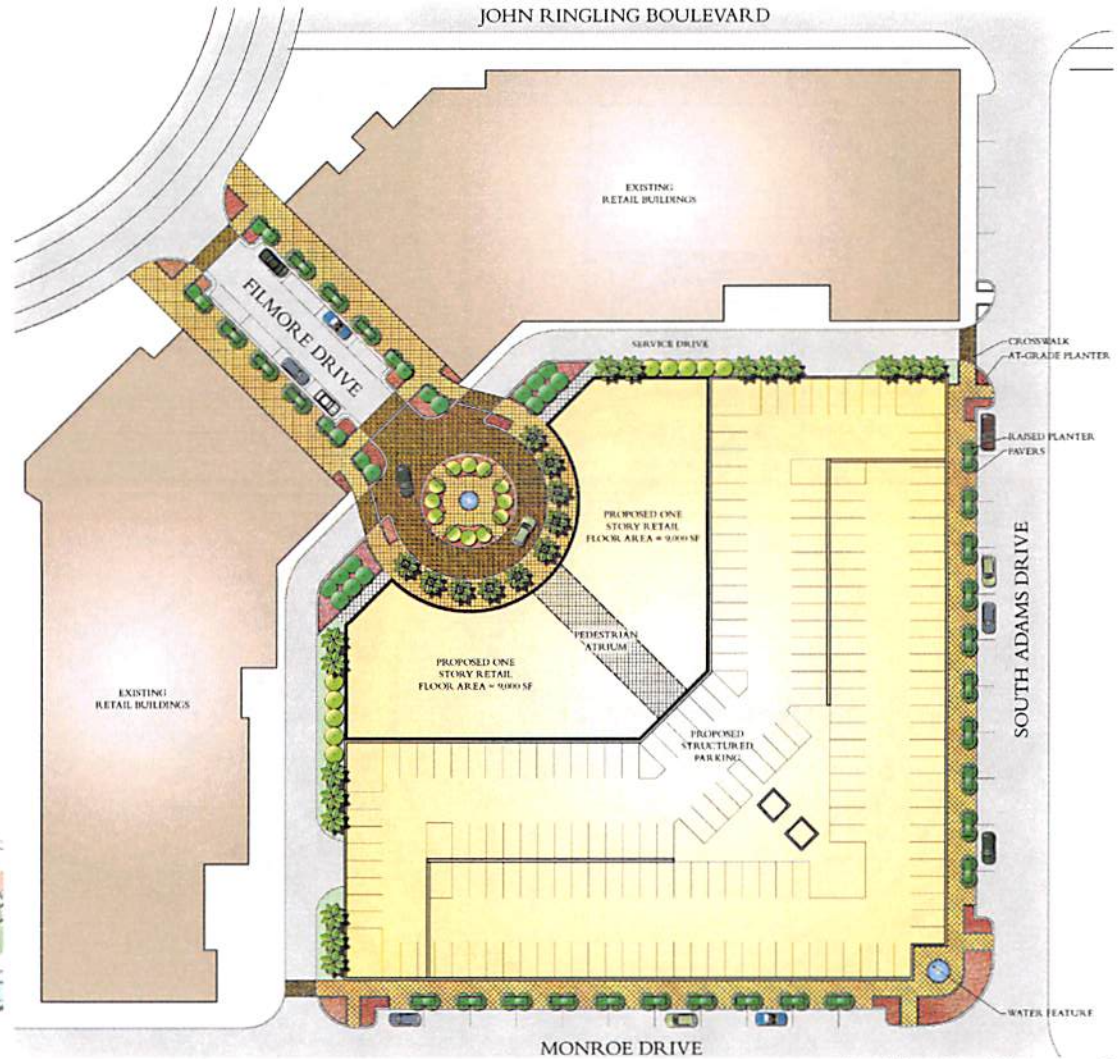


Figure 4-6: Aqua Quadrant Preliminary Concept D

GOLD QUADRANT - CONCEPT A

Structured Parking

- Provide additional on-street parallel parking along surrounding streets through re-stripping and vehicular lane width reductions on North Adams Drive and Madison Drive.
- Enhance landscape including buffers along street and at service alley.
- St. Armands "brand" streetscape on adjacent streets.
- Provide public restrooms and information kiosks within parking structure.

Gold Quadrant - Concept A	
	Spaces
Existing Surface Lot	202
Proposed Structured - Grade Level	106
Proposed Structured - Level 2	142
Proposed Structured - Level 3	142
Proposed Structured - Level 4	142
Proposed Structured - Level 5	142
Proposed Surface Lot	55
<b>Total Proposed</b>	<b>729</b>
<b>Gain (Above / Below Existing)</b>	<b>527</b>
Increased Need = 0 sf retail	0
<b>Net Gain</b>	<b>527</b>



Figure 4-7: Conceptual Structured Parking Entrance from North Adams



Figure 4-8: Gold Quadrant Concept A

GOLD QUADRANT - CONCEPT B

Surface Parking and Retail

- Provide additional on-street parallel parking along surrounding streets through re-striping and vehicular lane width reductions on North Adams Drive and Madison Drive.
- Improve service alleys including reserved employee parking.
- Enhance landscape including buffers along street and at service alley.
- St. Armands "brand" streetscape on adjacent streets.
- Provide public restrooms and information kiosk
- Provide additional retail opportunity.

Gold Quadrant - Concept B	
	Spaces
Existing Surface Lot	202
Proposed Structured - Grade Level	0
Proposed Structured - Level 2	0
Proposed Structured - Level 3	0
Proposed Surface Lot	136
<b>Total Proposed</b>	<b>136</b>
<b>Gain (Above / Below Existing)</b>	<b>-66</b>
Increased Need = 18,250 sf retail	52
<b>Net Gain</b>	<b>-118</b>



Figure 4-9: Gold Quadrant Concept B





CHAPTER 5  
SENSE OF PLACE

OVERVIEW

A goal of this Master Plan is to create a Sense of Place and identity for St. Armands that allows recognition and recall of the Circle as distinct from other places. Wayfinding is defined as knowing where you are, knowing your destination, following the best route, finding your way to your destination, and recognizing your destination. Wayfinding assists physical navigation and cognitive mapping, and therefore makes a place more pleasurable to inhabit. The strategy to promote wayfinding systems in St. Armands Circle relies on physical elements that help define user experience. Vehicular and pedestrian elements are easily recognizable and distinct in a well-designed community. Both levels are essential because many arrive to St. Armands by car, park, and then walk to destinations. Distinguishable landmarks, edges, routes, and signage can enhance Sense of Place.

Roadway and Medians

St. Armands Circle serves as a main thoroughfare to several of Sarasota County's barrier islands. Furthermore, St. Armands Key contains a vital evacuation route. Although it is both desirable and necessary to provide adequate vehicular circulation through the Circle, design of roadways should emphasize the predominance, safety, and comfort of the pedestrian. Difficulties arise from the Florida Department of Transportation (FDOT) standardization of roadway treatments that does not specifically address pedestrian high volume urban areas.

Standard FDOT rights of way give little space from the edge of pavement to the right of way, which limits the use of large canopy trees on the exterior sides of a street. St. Armands is fortunate to have wide medians that allow for more improvement options than narrow medians. Wide medians as opposed to narrow medians provide more alternatives to landscape and hardscape treatment since turning cars may pause at intersections between medians before turning, thus decreasing lengths needed for clear sight visibility. It also provides more space to adjust landscape and hardscape elements to required spacing. This greater width allows St. Armands to make improvements to the medians and still adhere to FDOT regulations. However, there are requirements regarding the spacing and size of tree trunks, as well as maintenance, within the clear sight windows. These windows are relative to speeds and differ among intersections on the Key. FDOT Index 546 clearly

defines these limits. Another obstacle that St. Armands will face for improved landscape projects on FDOT roadways is curbing of the roadways. Requirements relative to frangible trees, required distances of improvements from curbs and improvements that may be made on non-curbed roadways can be found in the most current (2008) *FDOT Design Standards*. Currently some areas do not have sufficient curbing for desired improvements.

Roadway surface treatments such as specialized crosswalks, textured roadway paving, and bulb-outs are allowable but require compliance approval from FDOT. Several intersections leading to the Circle do not have crosswalks. Crosswalks should be added at these intersections to safely funnel pedestrians to their destination. Crosswalks may be textured and/or raised to provide visual and textural warning to drivers. Paving bands may be added in the roadway, approaching the circle to slow traffic, signal a change of environment, and beautify the roadway. Paving at intersections at the edge of the District boundaries may be added to further slow traffic, and add to the notion of entrance to St. Armands. The benefits of bulb-outs include increased pedestrian safety by shortened crossing distances, provide refuge for pedestrians to pause in crossing, slow traffic, protect parked cars, and improve intersection aesthetics. Raised bulb-outs as opposed to flush-to-grade bulb-outs provide opportunities for pedestrian amenities such as seating areas and focal points. Further traffic calming techniques, some currently in play at St. Armands, include a perceived narrowing of travel lanes through use of street trees and on-street parking.

As is typical for most cities and towns, St. Armands will struggle with utility upgrades and replacements. The cost for these items is extraordinarily high and requires long-range capital improvement planning and a financial commitment that extends many years. Most common underground utilities include water lines, storm, and sanitary systems. Above ground utilities typically include electrical, telephone, and cable televisions. Most often, electrical service dominates the visible utility system while telephone and cable television lines may be located on the same pole, or buried. Prior to utility improvements, soil and drainage analysis should be performed. Existing underground utilities must be located and evaluated prior to commencement of any roadway or streetscape project. The St. Armands community has voiced a great desire to bury existing overhead utilities that line the primary approach along John Ringling Boulevard. This has been a



Figure 5-1: Existing On-Street Parking



Figure 5-2: Filmore Drive (Looking Toward Harding Circle Park)



Figure 5-3: John Ringling Boulevard (Facing West)



Figure 5-4: Existing Median 1



Figure 5-5: Existing Median 2



Figure 5-6: Existing Median 3

project in the works for the Circle for quite sometime. It is a necessary step to curbing the roadway, adding a gateway, and enhancing medians.

Approach and Gateway

The wayfinding system currently in place needs consideration to aesthetic treatment, prominence, and locations to establish a clear hierarchy. Approach and arrival are important attributes that provide a Sense of Place. Currently, travelers arriving via the John Ringling Bridge perceive no sense of arrival to the Circle. The presence of the Circle is unapparent until one is driving around Harding Circle Park, in part because roadway treatment across Coon Key lacks rhythm and formality. Power lines centered in the median detract significantly from the natural beauty of the area.

An existing feature currently welcomes you to St. Armands. The "Three Graces" adorns the median at the intersection of John Ringling Boulevard and Washington Drive. A low curvilinear wall with text reading, "St. Armands Key" highlights the statue. Across the street to the north, the St. Armands Key Lutheran Church sign wall minimizes the median feature. Minimal landscape is provided surrounding the statue. A walkway crosses in front of the statue, however no crosswalk is provided to the median. While the existing feature emits a pleasant tone, it understates the arrival into a culturally and historically significant place.

A secondary approach from Longboat Key affords views of sodded medians with offset statues, and a double row of palms with intermittent understory trees. However, utility appurtenances, warning signs, and power lines interfere with the approach. To the south and west, entrances from Lido Key serve as minor arrival points. Compared to the John Ringling Bridge and North Boulevard of the Presidents accesses, these minor points channel a much smaller traffic flow. From Ben Franklin Drive, the coconut palm lined median captures the tropical feel and the proximity to the beach, while views along the canal delineate a physical edge. From South Boulevard of the Presidents, crossing of an elevated bridge, followed by the presence of sculpture in the median, implies approach to the District. At the District boundary, both minor entrances have recent landscape improvements that distinguish them from adjacent medians. These serve as District focal points.



Figure 5-7: View North Across Coon Key



Figure 5-10: Approach (Facing West)



Figure 5-11: Approach (Facing East)



Figure 5-14: View West to Lido Beach



Figure 5-8: Existing Gateway



Figure 5-12: View North to Longboat Key



Figure 5-15: Recently Improved District Focal Point



Figure 5-9: "The Three Graces"



Figure 5-13: Approach from Longboat Key

Signage Systems

Standard sign and post assemblies serve as information sources. Signs are often placed closely together and some signs are in poor condition or have twisted around the post and face away from intended direction. These signs announce directions (to parking lots, Mote Marine, and Lido Beach), speed limits, bus stops, handicap parking, designated curb side parking, street names, and traffic flow (stop, yield, etc.) The abundance and condition of signs contribute to navigational difficulties, and distract drivers. Furthermore, the standard post signs do nothing to build the character and identity of the District.

St. Armands Identity

The history and identity of St. Armands is evident in elements around the Circle. The sculpture, pink sidewalks, and shell walkway accents throughout the district connect St. Armands with its history. Successful implementation of the "Save our Statues" program was a good step towards renewal of Ringling's vision. The program was initiated with the 2001 adoption from the National Register of Historic Places. The registration as a national historic place designated Harding Circle and its surrounding medians with significance in the achievements of community planning and development throughout the 1900's. The sculptures played a large role to the history and vision of St. Armands Circle. Over the years that St. Armands sat idle, the statues deteriorated and disappeared. The restoration and addition of statues took a giant step towards public education and appreciation concerning the importance of St. Armands Circle.

As St. Armands has endured changing times since its inception, the pink sidewalks have remained in some areas and vanished in others. While the faded and cracked walks are not the originals, the intersection of colored bands through the landscape echoes Ringling's vision. Shell accents occur occasionally throughout the streetscape. Where present, these walkway attributes create character and contribute to the unique identity of St. Armands Circle.

In addition to the Project Team analysis, community input regarding Sense of Place was included in the Master Plan to help formulate recommendations.

Community Input

- The District needs better signage.
- Need better signage to direct cars to the parking lots.
- A gateway is needed.
- Signage is inadequate.
- Area once had too little signage and now has too much.
- It is desirable to direct traffic to Lido and Longboat Key, but this could negatively affect residents.
- Wayfinding should be provided in advance of St. Armands.
- Pedestrian signs should be improved.
- Traffic calming could be achieved by lane designation and better signage.
- Unique theme is important
- Landscape should be consistent with Ringling's vision.
- Sidewalks should all be the same surface. Unifying walks with neutral colors are desired.
- Streetscape is very cluttered. Need better planning of trash receptacle placement.
- Landscape improvements are needed along John Ringling Boulevard approach from Sarasota
- Landscape should not obstruct store visibility.
- Each street could have its own look, however, cohesion and identity should be provided.



Figure 5-16 Sign Clutter



Figure 5-17: Standard Sign and Post



Figure 5-18: Quadrant Banner



Figure 5-19: "Pink" Walks



Figure 5-20 Shell Sidewalk Accents



Figure 5-21: Historical Medallion

MASTER PLAN OF THE COMMERCIAL TOURIST DISTRICT ON ST. ARMANDS KEY



Figure 5-22: Wayfinding Inventory

RECOMMENDATIONS

The medians of St. Armands were originally envisioned to be open park spaces that would add to patrons' enjoyment of the Circle. These medians are currently adorned with statuary, historical references, and tropical landscape. However, the use of medians as park space has been lost with lack of accessibility. Furthermore, as discussed in the Transportation, Parking, and Circulation portion of this document, traversing from interior on-street parking to Circle destinations presents challenges in accessibility and safety. The following median concepts address an increased appreciation of median features and focal points, enhance walkability of the District, and improve aesthetics.

Median Concept A

Concept A proposes a median design that is founded in the history of St. Armands. It is a variation to Mable Ringling's Rose Garden. The concept proposes a parterre garden treatment to the median to reinforce the up-scale nature of the Circle. Medians would be divided into three (3) parterre gardens. The center garden would include a hardscape focal point surrounded by manicured geometric plantings. The smaller end gardens would display statues, highlighted by elaborate planting patterns. Shade trees would provide comfort for users. Walkways would be provided along the edge of the median that would allow patrons parked on the interior of the road to walk through medians to the nearest crosswalk. The gardens, combined with edge sidewalks would allow for use of the medians as true park space.

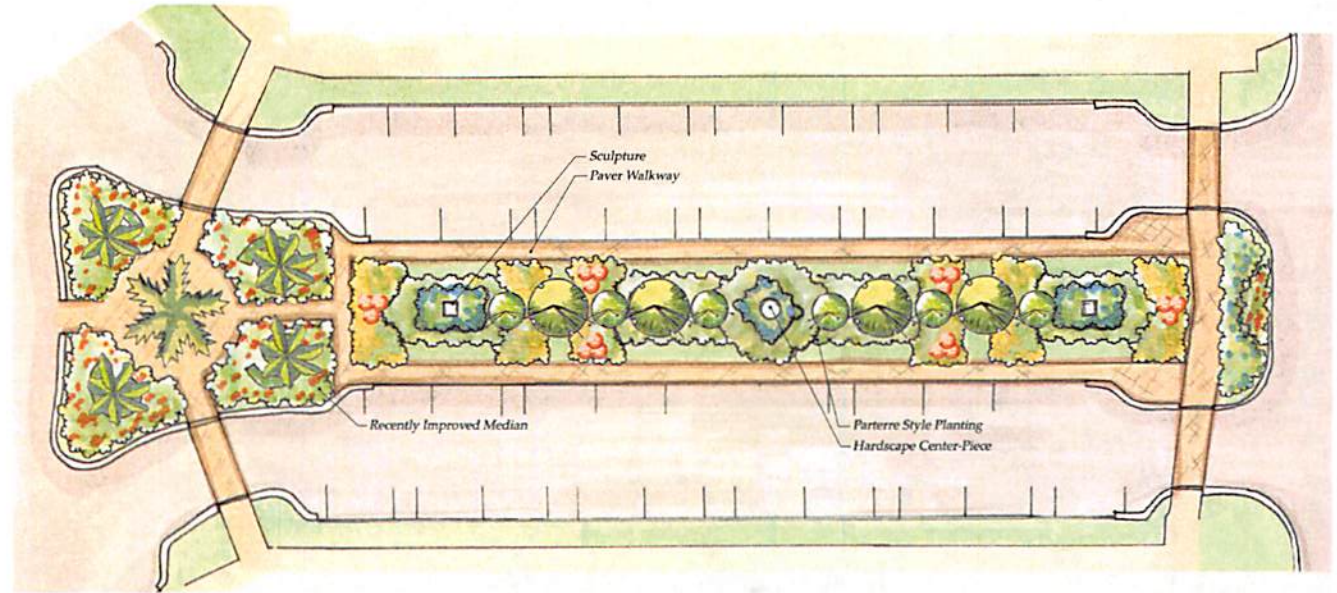


Figure S-23: Median Concept A



Figure S-24: Parterre Garden Example A



Figure S-25: Parterre Garden Example B



Figure S-26: Parterre Garden Example C



Figure S-27: Parterre Garden Center Piece Example

**Median Concept B**

Concept B is embedded in the classical well-known image of St. Armands Circle and includes lush, tropical plantings. Statues remain as a focal point for the medians, but are emphasized with additional landscape. Decorative walkways on the edge of the median allow access to the statues. Plaza spaces are created surrounding the base of the statue so that patrons may access and closely view the sculpture's features, creating a greater appreciation for the statues as public art. Walkways are provided in the median to create safe pedestrian access from parking to designated crossings. This element of design will provide choices of route and minimize foot traffic in landscaped areas. Native plant massings, accented with tropical plantings add visual interest and rhythm to the street. Reduction of sodded areas and use of plants also contributes to water conservation through reduction of irrigation need, and absorption of rainfall.

While these Median Concepts would require a similar initial investment, Concept B would likely have a lower, long term cost for maintenance.

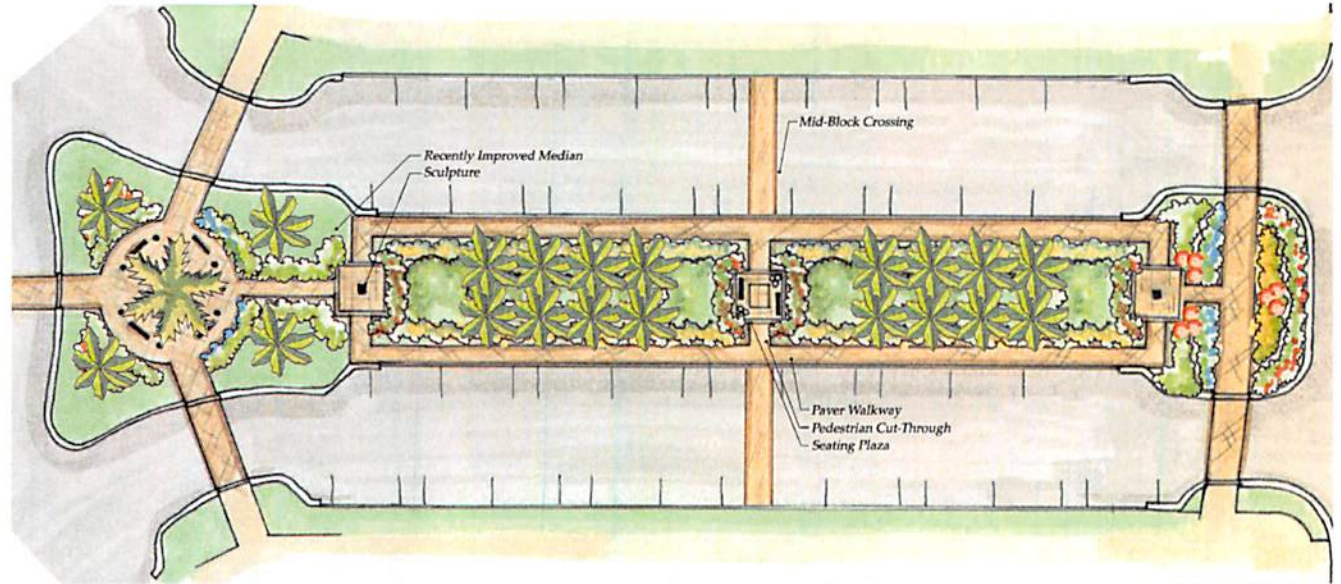


Figure 5-28: Median Concept B



Figure 5-29: Example of Lush Tropical Plantings at St. Armands Median



Figure 5-30: Example of Mass Median Plantings (with raised planter)



Figure 5-31: Example of Palm Lined Median

**Streetscape**

Streetscape treatment contributes to the quality or inefficiencies of street life. As stated previously, it is important to have programmed spaces. St. Armands streetscape should be divided into three zones, containing specific elements that contribute to the function of circulation, site furnishings, and outdoor dining (where present). Within the CT District, narrow rights of ways combined with zero front lot lines produce limited sidewalk space. A two (2) foot clear area should be provided adjacent to the curb to allow parallel parked cars to open and shut doors without obstruction. A minimum of five (5) feet shall be maintained for circulation to promote pedestrian comfort. Seating areas should consist of ample space to comfortably sit without intrusion from passing pedestrians. Trash receptacles should be located nearby seating areas to collect litter that may otherwise be placed on the street. Seating areas should have some buffer between benches and trash receptacles to reduce unpleasant odors.

Currently the District is void of bicycle racks although many patrons arrive by bicycle. Due to lack of bicycle features, bicyclist are forced to leave bikes leaning against raised planters or locked to trashcans or light posts. Bicycle facilities should be provided at pedestrian nodes and strategic locations throughout the Circle. Addition of these amenities would encourage users of the City of Sarasota Multi-Use Recreational Trail (MURT).



Figure 5-32: Existing Streetscape



Figure 5-33: Existing Streetscape



Figure 5-34: Existing Streetscape



Figure 5-35: Existing Streetscape



Figure 5-36: Existing Streetscape



Figure 5-37: Existing Streetscape



Figure 5-38: Existing Streetscape



**Streetscape Concept A**

Streetscape Concept A is intended to be paired with Median Concept A. It includes a quadrant gateway at the main entrance from the Circle, with a water feature or other hardscape focal point. Pedestrian archways at the Circle entrance of each quadrant integrate the streetscape design with the pedestrian gateway design. A strip of pavers adjacent to parallel on-street parking is proposed to maintain a clear distance for passenger side doors. A small planting area buffers furnishing zones from the roadway. Furnishing zones include concave and convex benches that face buildings and provide seating for strangers and friends. Tree grates provide shade for the seating areas, while potted stationary planters with tropical floral arrangements and palms offer visual interest. The provided circulation zone, eight (8) feet typical, five (5) feet minimum, makes a continuous pattern that meshes with the median parterre concept. Between the furnishing zone and storefronts, geometrically designed pavers designate the clear walking path. Access ramps between curb and circulation zone are provided at regular intervals. Ramps to access on-street parking are provided approximately forty-seven (47) feet on center. Dining zones are partially enclosed with a low knee-wall, to grant diners a separation from pedestrian traffic and an increased sense of privacy. Breaks in the knee wall provide direct valet access to outdoor café spaces.

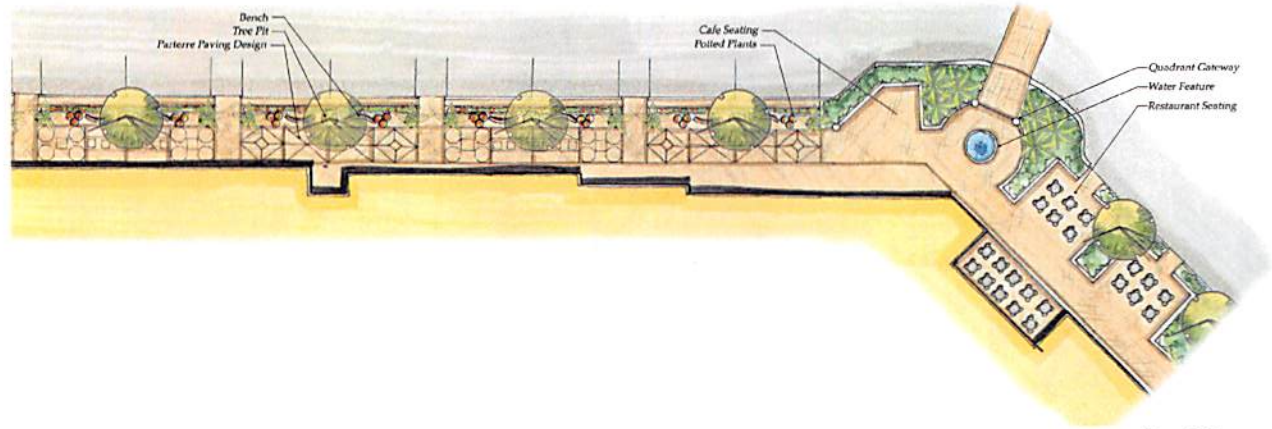


Figure S-39: Streetscape Concept A

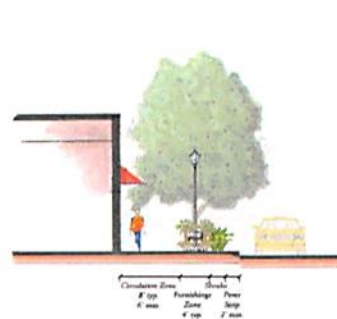


Figure S-40: Streetscape Concept A - Furnishings Zone Section

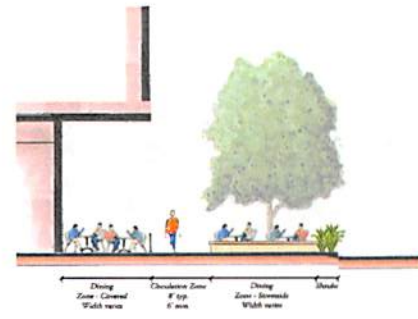


Figure S-41: Streetscape Concept A - Dining Zone Section

**Streetscape Concept B**

Concept B also includes a quadrant gateway at the main crosswalk entrance from the Circle with enhanced landscape at pedestrian entrance points. A paver strip located adjacent to the curb abuts raised planters with canopy trees. A paver field defines the circulation zone, eight (8) feet typical, five (5) feet minimum. Ramp access is provided approximately forty-seven (47) feet on center. At access areas, artistic tiles or pavers identify quadrants, through images, design, or color. At the midpoint between access areas, raised planters with canopy trees and shrubs provide a furnishing zone refuge. Seating areas are provided with facing benches perpendicular to the roadway. Additional resting areas include a seat-wall that outlines the circulation zone. To further distinguish furnishing zones, decorative in-grade medallions are placed at the center of the circulation zone. Café spaces are enclosed with a seat wall and separated by the roadway with a strip of planting space. Large café spaces may be broken up by a seat wall that extends to the circulation zone.

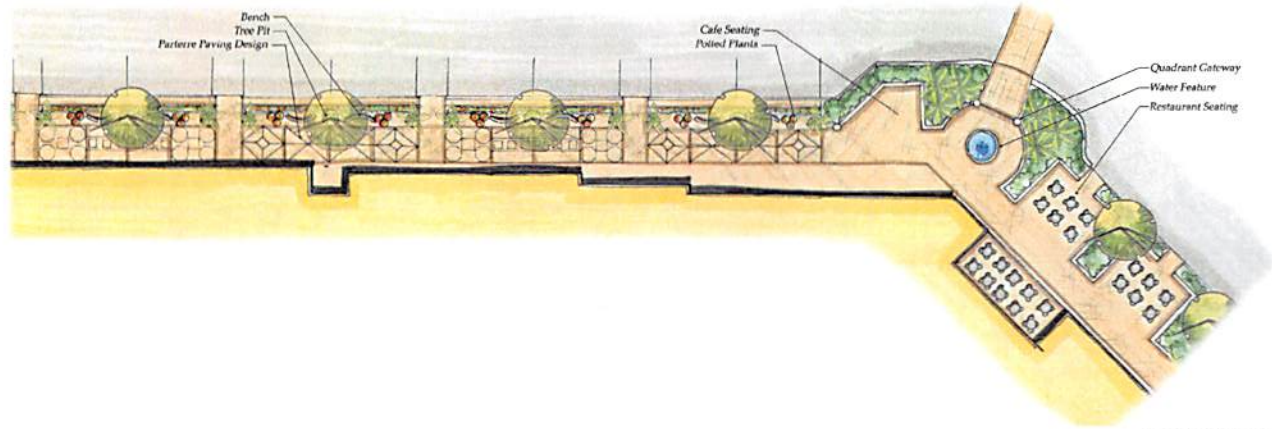


Figure 5-42: Streetscape Concept B

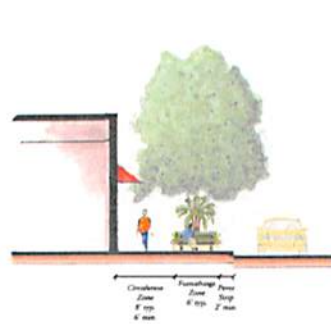


Figure 5-43: Streetscape Concept B - Furnishings Zone Section

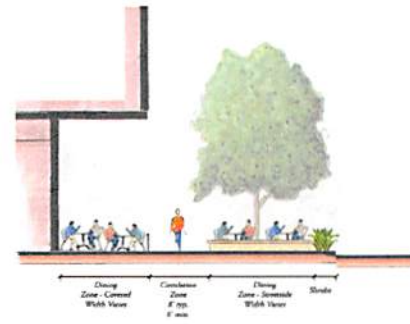


Figure 5-44: Streetscape Concept B - Dining Zone Section

**Quadrant Individuality**

The four quadrants of St. Armands Circle serve as a basis for physical and mental mapping reference points. Stores, restaurants, and features are repeatedly referenced by location within a specific quadrant. St. Armands inhabitants and patrons commonly associate direction with reference to quadrant color rather than geographical space. The St. Armands Circle Association maps illustrate store locations through a color-coded map. Kiosks displaying the map are located at north and south surface parking lots and on each quadrant near the inner circle. To assist with wayfinding, respective color-coded banners garnish the streetlights. These banners in association with the St. Armands Circle Association maps assist with individual's understanding of physical space and community layout and ease navigation through the space.

Quadrants differ additionally through architecture, landscape, and hardscape treatment. These elements evoke various spatial feelings and define user experience. Quadrants offer different spatial relationships in terms of scale and massing. Sidewalk corridors may be covered by awnings in some areas and completely open in others, giving variations in sun, shade, and temperature. Types and amounts of vegetation present along walkways offer pedestrian exposure in some spaces and concealment in others. While each quadrant maintains individual characteristics, the many differences are often distracting. The Design Guidelines Chapter of this document addresses strategies to make the Circle cohesive as one entity through unified elements without sacrificing character.

Merchants have an opportunity to cooperate on ideas that would bring individuality and identity to each quadrant. These opportunities could include coordination of features such as awnings, covered cafe spaces, cafe furniture, building colors, and store name signs, to name a few. Further quadrant identification and individuality could be expressed through subtle changes in streetscape design. Subtle changes may include alterations in plant materials and colors. Repeating streetscape elements may be individually catered to each quadrant.



Figure 5-45: Proposed Improvements for Sense of Place

Approach and Gateway

Traversing the John Ringling Bridge provides a striking view across the blue waters of Sarasota Bay with occasional pauses of stately Medjool Palms. Continuing a sequence of events from the bridge, across Bird and Coon Keys, and into the Circle would heighten this spatial experience. A clear arrival point is essential to create decisive entry into the St. Armands District. Proposed transition and cue zones across Coon Key, paired with an entrance feature provide rhythmic elements that assist in navigation. Elements should be properly scaled to address both drivers and pedestrians.

The Project Team has developed a gateway concept illustrated below. This concept proposes a center median tower with hints to the eclectic architecture of St. Armands Circle. The Mediterranean architectural features such as the archway and decorative iron detail are reminiscent of the Cà D'Zan. The use of Key West architectural features is illustrated through use of sloping metal roofs, wall ventilation, and dormers and suggests the tropical location of St. Armands Key. The archway is repeated on each side of the street to provide appropriate scale and pedestrian entrances. The feature as a whole provides a distinct entrance into (and exit from) St. Armands Circle. Proposed crosswalks allow pedestrians to cross beneath

the tower and also provide opportunities for imbedded plaques or other features that narrate the rich history of St. Armands Circle. The proposed gateway feature would be located in the median at the intersection of John Ringling Boulevard and Washington Drive. This location provides an announcement to the approach of an area where speeds should be reduced, pedestrians may be present, and important information is posted. Spatial rhythm leading towards and away from the arrival point is a key to establish conscious entrance to a place. Repeating hardscape elements and roadway pavers combined with median landscape across Coon Key will also signal change. This scenario provides ample room to cue drivers across

Coon Key as well as create transition areas between the arrival point and the District edge, marked by decorative pavers spanning the intersection. Similar treatment could be added where North Adams Drive intersects North Boulevard of the Presidents. A scaled down version of this feature would address the secondary entrance to the Circle from Longboat Key.

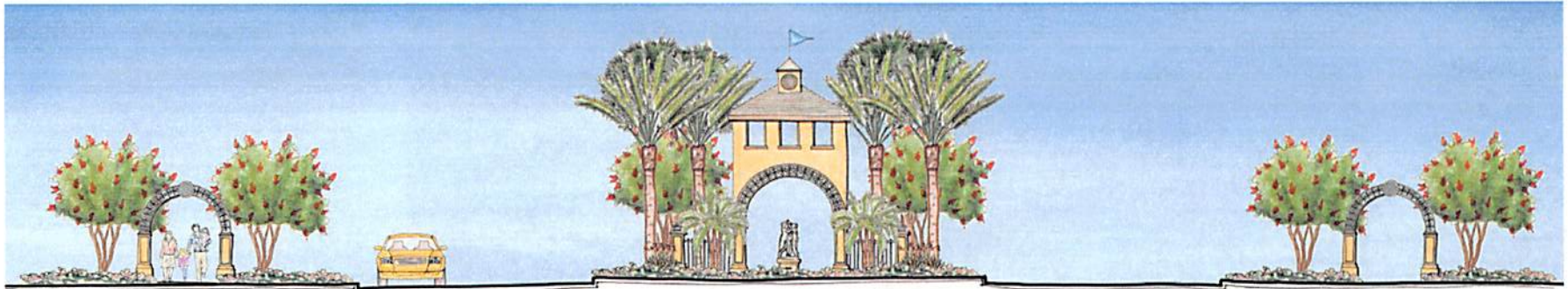


Figure 5-46: Proposed Gateway Elevation

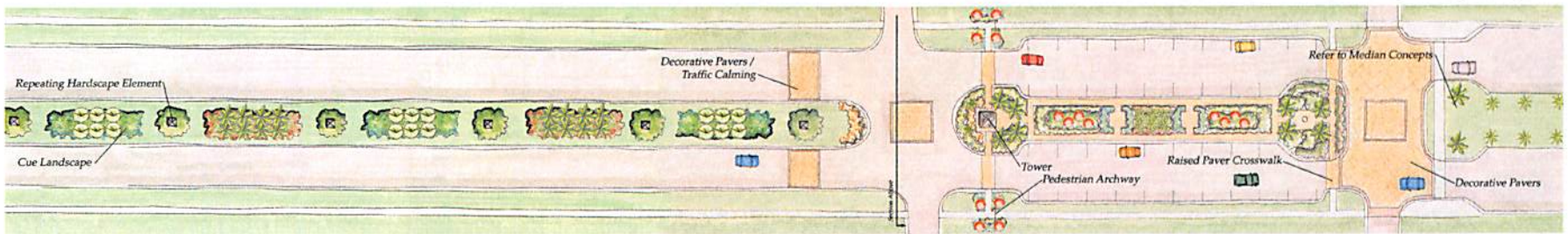


Figure 5-47: Proposed Gateway and Approach Plan

The feasibility of these improvements first requires implementation of other Master Plan components, and phases. Figures 5-49 and 5-51 provide an alternative gateway concept that proposes to enhance the existing "The Three Graces" sculpture. Addition of landscape would provide emphasis to the statue through contrasts in color and texture. Adding a raised pedestal beneath the statue and increasing the wall height could increase prominence of the feature. A sheeting wall of water behind the sculpture would add texture and visual entrance, and create a unique backdrop to highlight "The Three Graces." This option may be carried over to South Boulevard of the Presidents, at the Marzocco sculpture, to create a gateway at the secondary entrance from Long Boat Key. The opportunity exists to make the gateways at the above-identified locations different from each other, or use a combination of each.

The recently improved medians serve as District focal points at the intersections of John Ringling Boulevard and Adams Drive, North Boulevard of the Presidents and Madison Drive, John Ringling Boulevard and South Washington Drive, and South Boulevard of the Presidents and Monroe Drive. These District edge features include statues paired with lush landscaping. The recent bulb-outs and landscape improvements establish a palette for further improvements.



Figure 5-48: Existing Gateway at John Ringling Boulevard



Figure 5-50: Existing Gateway at South Boulevard of the Presidents

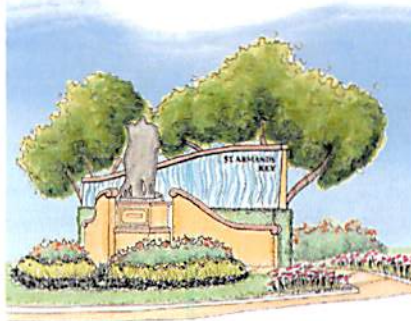


Figure 5-49: Enhanced Gateway at John Ringling Boulevard

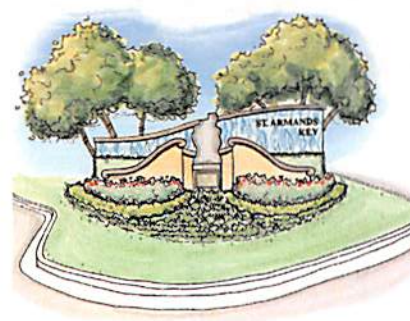


Figure 5-51: Enhanced Gateway at South Boulevard of the Presidents



Figure 5-52: Proposed Directional Signage

**Signage**

The abundance and frequency of existing directional signage provides an overload of information for a driver entering and passing through St. Armands. This situation reduces the effectiveness of signage, especially for drivers facing distractions of a new environment. Fewer sources of information in a prominent format are proposed in Figure 5-52. Signs with multi-panels would consolidate sources of information and assist drivers in understanding the layout of St. Armands. With this technique, sources of information become more recognizable and better serve their function. Improved signage aesthetics would also be a positive impact on the visual appearance of the community.

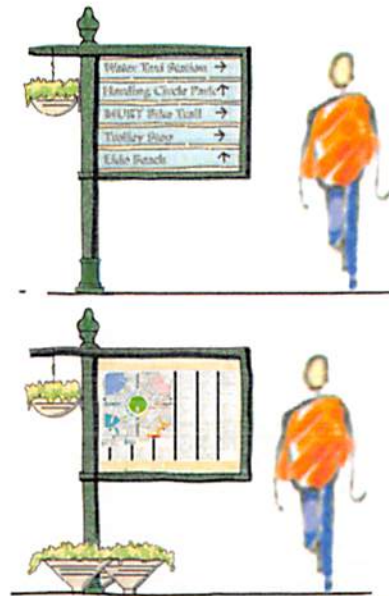


Figure 5-53: Proposed Pedestrian Signage and Directory

Pedestrian signage directs pedestrians to nearby areas, such as Lido Beach, Harding Circle, destination stores, or the City of Sarasota Multi-Use Recreational Trail (MURT). Current directories show only the St. Armands Circle Association maps. Additional pedestrian signage is needed to direct pedestrians throughout the Circle. Directories should be located along pedestrian paths and at each entrance to the Circle from parking areas. Pedestrian signage should be accessible to all able-bodied and disabled users. Considerations for brail lettering, hearing impaired aid, and kiosk height should be incorporated into new signage systems so that St. Armands has a pedestrian-friendly environment for all. The proposed concept in Figure 5-53 offers an option for two-sided signs that blend with the existing lighting fixtures around the Circle.



Figure 5-54: Proposed Decorative Street Signage

Standard street signs may be aesthetically improved by adding decorative posts and bases. The character for decorative signage should be integrated with other proposed street furnishings and existing elements, such as lighting, as outlined in an adopted design manual.



Figure 5-56: Existing Signage



Figure 5-57: Existing Merchant Directory

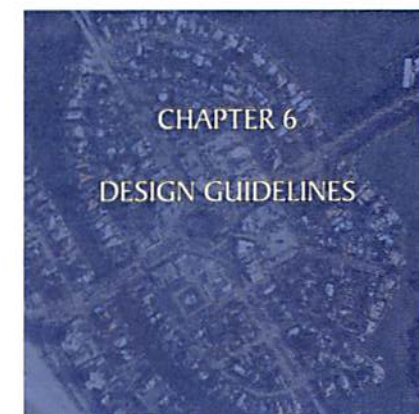
#### Additional Opportunities

While the techniques described above improve wayfinding and build a basis for identity, St. Armands has much more to offer. With its rich history, programs may be adopted to increase these opportunities. The walking sculpture tour should be embraced, as it has taken large steps to reestablish the historical context of St. Armands. Currently, several statues are inaccessible and can only be viewed at a distance. Appreciation of the "Save our Statues" tour could be enhanced by provision of walkways and access to the statues.

#### Examples of additional programs:

- Historical facts tour could tell the story of St. Armands and include "fun facts" like circus elephants built the first causeway and the park is named after President Harding. Tour may include a brochure with historical photographs and a map, with relevant locations, and markers within St. Armands.
- Botanical tour could include plant identification plaques for tropical and native flora. May include brochure with plant images and facts. Opportunity exist to educate on invasive species.

St. Armands could become equally as important as a cultural destination as it is a shopping destination through adoption of these programs. In addition, they would give St. Armands an identity unique from other places and reach the wayfinding goal to assist visitors recognizing and remembering St. Armands as a distinct place.



CHAPTER 6  
DESIGN GUIDELINES



**OVERVIEW**

Design guidelines will provide a baseline for adapting and enhancing redevelopment in St. Armands. The diverse range of storefronts contributes to the identification and uniqueness of St. Armands Circle. While it is essential to preserve the eclectic image of the circle, it is also important to integrate a system of unifying elements. Through the development and implementation of design guidelines, the unifying aesthetic elements will define the St. Armands brand and reinforce a harmonious "sense of place". Consistency, unity, and flexibility within Design Guidelines should encourage creativity among developers, designers, and the City in redevelopment or renovation of properties within the Circle.

Some of the unique qualities of St. Armands Circle are the historical features, eclectic ambiance, hardscape elements, and tropical landscape. There is an opportunity to better enhance these qualities, and enhance less attractive design elements in an effort to achieve a finer level of sophistication.

Consistency of hardscape and architectural elements is lacking in areas of St. Armands Circle. Hardscape features that appear to be lacking uniformity are paving, site furnishings, and their arrangement. The paving designs tend to relate more with each building entrance rather than connect to the district as a whole. As the user travels along the walkway, varying designs and schemes interrupt the pavement resulting in an incongruent rhythm. In addition to the pavement patterns, the paving materials appear to differ from each store resulting in a disjointed theme and often found in front of one store. Site furnishings are essential for accommodating users. It is evident that furnishings such as benches, waste receptacles, and lighting have been standardized in some areas of St. Armands Circle, which tend to be prominent over the non-conforming areas. Formally adopting a standard for site furnishings, such as street lighting, waste receptacles, seating, newsstands, bicycle racks, raised planters, etc. will offer a more unified theme.

While the lush tropical plantings found on St. Armands Circle add an aesthetic quality; the function, placement, and selection of plant material tend to lack uniformity. In many locations around the Circle, plant material has been installed and impairs visibility to store fronts. Conversely there are locations where plant material is non-existent,

which results in a lack of balance and no canopy coverage to provide shade for users. In addition, the lack of plant material results in an insufficient buffer between the pedestrian and roadway as well as insufficient screening for outdoor dining. The placement or arrangement of plant material appears to only relate to each individual storefront rather than The Circle as a whole. Variation is important to provide interest, however variation coupled with unifying elements results in a harmonious relationship. The selection of plant material correlates to the function and placement. While it is essential to develop a palette of plants centered on long-term sustainability, it is also important to consider planting design principles such as, color, form, texture, balance and scale.

With the adoption of Design Guidelines, St. Armands Circle will be provided with a framework for streetscape design, façade renovation, infill redevelopment, creating a sense of place, and general improvements. They will provide for design consistency that will be implemented with high quality materials. Through the visual imagery adopted by St. Armands Circle, a compatible theme will create a sense of place for the Circle. The use of common design elements such as street and pedestrian lighting, particular colors of paving surfaces, or fencing materials contribute to the unity of the Circle as a whole without stripping it of uniqueness.

**IMAGE**

**Building Façade**

The objective for building façade guidelines is not to create homogeneity between buildings, but to create visual and spatial interest through architecture. A minimum requirement for new construction and building renovation that is consistent is able to brand a place through proper image. Sense of entry and rhythm is expressed through common elements such as height, scale, massing, directionality, platforms, and bases.

Diverse building façades provide an eclectic ambiance, which provides a sense of separation and individuality. Although the uniqueness of the building façades adds character as a whole, several building façades, and accompanying entrance features create distraction by ignoring the historical context and existing building styles of the Circle. The varying architectural styles leads



Figure 6-1: Key West Style Architecture

Figure 6-2: Outdoor Dining



Figure 6-6: Architectural Detail

Figure 6-7: Architectural Detail



Figure 6-3: Architectural Detail

Figure 6-4: Access to Second Floor Shops



Figure 6-8: Street lined with Planters

Figure 6-9: Planters on Sidewalk



Figure 6-5: Existing Directional Signage



Figure 6-10: Existing Merchant Directory

to a competition of style. Architectural guidelines serve as a controlling device to guide future development and redevelopment of existing buildings.

**Building Style**

The ambiance of a street is characterized through its architectural character. The original architecture of Ringling’s vision has faded with the passing of time. Remnants of what once was remain. New construction and renovation have an opportunity to capture the unique architectural style of St. Armands and create a strong sense of place.

**Roadway Signage and Directional Signage**

Roadway signage and directional signage will augment existing signage and should be constructed to meet the goal of superior signage design. It is recommended that standard roadway signs include a decorative pole standard to match the character of decorative light posts in the Circle. The sign faces and sign heights must meet standards set forth by Florida Department of Transportation (FDOT). The sign face may be inset into an FDOT approved decorative frame. Directional signage will be consolidated into prominent sign structures, with FDOT approved sign faces. Signs and other hardscape elements located within an FDOT right of way must be structurally designed to meet FDOT requirements. Non-standard signage will require a maintenance agreement with FDOT.

**Information Kiosks and Pedestrian Signage**

The design of informational kiosks and pedestrian signage should correspond with the St. Armands image through matching posts. The sign design presented in the Sense of Place portion of this document suggests embellishing information kiosks and pedestrian signage with hanging planters at the post tops and potted plants at the base.

**Banner Program**

Banners affixed to existing streetlights identify quadrants. The Circle may employ the option to interchange or add banners for St. Armands seasonal or special events. Durable fabrics and connecting devices are essential for the long-term durability of the banners. Adjustable brackets may be added to accommodate temporary banners or various sized banners.

**Varying Sidewalk Width Treatment**

Where distances between the circulation zone and building face vary, consistent materials and colors should be used. To distinguish entrances and special areas such as newsstands, or pedestrian nodes, paving patterns may differ or concrete banding may be used. Paving materials throughout the Circle should be similar colors, textures, and styles with only slight variation allowed to designate special zones.

**Furnishings / Theming**

Theming and branding for St. Armands may be contributed to by selection of site furnishings. Consistent furnishings throughout the Circle enhance St. Armands’ identity, and connect quadrants through common elements. Selection of site furnishings includes the following:

- Benches
- Trash Receptacles
- Planters
- Tree Grates
- Bollards / Pedestrian Lighting
- Plant Material Palette
- Surface Materials – Materials and Patterns

Three concepts have been provided for streetscape theming. Concept A identifies modern elements; Concept B embraces traditional elements; and Concept C employs artistic elements. Ideas from each of these may be incorporated into each. Historical, identification, and wayfinding elements may be incorporated into tree grates, medallions, benches, or pedestrian lighting. Quadrant individuality may be expressed through colors and styles of potted planters, and a plant palette. These subtle variances should complement each other so that rhythm and commonalities are present throughout the Circle. Possibilities and combinations of elements are endless, a furnishings plan should be well thought, and incorporated into all streetscape improvements.



Figure 6-11: Furnishings Concept A



Figure 6-13: Furnishings Concept C



Figure 6-12: Furnishings Concept B

IMPLEMENTATION

Design Review Board

Various recommendations could be proposed to assist in the enhancement of historical features, eclectic ambiance, hardscape elements, and landscape plantings. In an effort to achieve a more consistent image for St. Armands Circle we advocate the following strategies:

- ✕ Retain a Branding/Imaging Firm to develop a theme for St. Armands Circle.
- Implement and maintain design guidelines.
- Improve and enhance existing streetscape features and landscape medians.

Developing a brand for St. Armands Circle will improve The Circle's image while establishing a unified theme. Such branding will derive from features including an historic motif, cultural trait, environmental feature, or a combination. Upon the determination of a brand, an iconic symbol will be developed and marketed as an identification tool.

Design guidelines are a unifying tool bringing future development and redevelopment of The Circle to a higher level of sophistication. Centered on consistency, the design guidelines will be developed by a consultant to cover issues including form, color, texture, and scale. Upon the development and acceptance of the design guidelines, a design review board will be established to oversee capital improvements made within The Circle. Typically the composition for a design review board consists of, but is not limited to the following City Council appointed members:

- Design professional representative
- Development representative
- Community representative
- Local residential representative
- Local business representative
- Historian/Culturally knowledgeable representative

The objectives for the design review board include the following items:

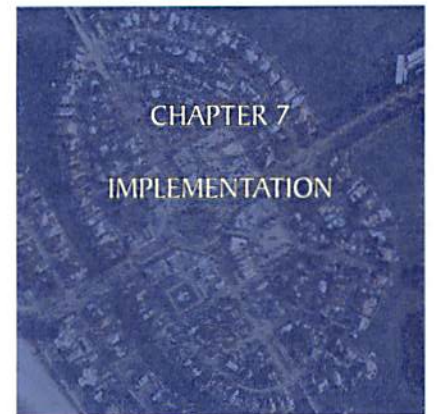
- Maintain and Implement the design guidelines.
- Provoke quality design and urban planning that remains true to the context of St. Armands Circle.
- Allow flexibility in design guidelines to encourage creativity.
- Encourage communication and involvement among developers, LMR, City of Sarasota, and the community.

Maintenance Program

A well-maintained streetscape is key to preserving enjoyable streets. Without maintenance, any streetscape will decline. A maintenance program should be developed that clearly outlines responsibilities of the City, Merchants, and Landowners. Maintenance guidelines should address, but not be limited to, the following elements:

- Trash Disposal and Collection.
- Roadway Sweeping.
- Sidewalk Sweeping and Removal of Loose Trash.
- Site furnishings maintenance.
- Landscape Maintenance (pruning, mowing, weeding, fertilization, mulching, pest control, replacement of plants, soil monitoring, etc.).
- Irrigation Maintenance (water monitoring, spray and rotor head maintenance, pipes and valve maintenance, controller and timer monitoring, etc.).
- Sidewalk Repairs (cracks, staining, cleaning, etc.).
- Building Repairs and Maintenance (paint, cleaning, cracks, etc.).
- Lighting (cleaning of posts and bases, replacement of bulbs, etc.).

- Sign Maintenance (maintain readability, clean and repair sign structures, etc.).
- Public Utilities (maintenance and repair).
- Maintenance Schedule for Each Task.



CHAPTER 7  
IMPLEMENTATION

OVERVIEW

The following tables identify improvement projects in accordance with the recommendations for the St. Armands CT District. The projects are categorized by the following groups:

- Parking and Connectivity (PC)
- Redevelopment Opportunities (RO)
- Sense of Place (SP)

Understanding unforeseen circumstances, the projects are listed in the most probable sequential order per category, which is based primarily by scheduling and availability of funds.

PC - Parking and Connectivity				
Strategy	Project Name / Description	Source of Identified Need / Responsible Party	Time Frame	Relative Capital Cost / Potential Funding Sources
PC1	<b>On-Street Parking Re-Capture Project</b> <ol style="list-style-type: none"> <li>1. Survey S. Blvd. of the Presidents (between Monroe and S. Washington)</li> <li>2. Re-striping and lane adjustments along S. Blvd. of Presidents (between Monroe &amp; S. Washington)</li> <li>3. Switching parallel to angled parking at selected locations</li> </ol>	Identified in the Master Plan and supported during Workshop #2 / LMR & City of Sarasota	January '09	<ul style="list-style-type: none"> <li>• Consultant Fees - \$21.5K</li> <li>• Construction Cost – \$15K</li> <li>• Funding Source: City of Sarasota</li> </ul>
PC2	<b>Surface Parking Improvement Plans</b> North (Gold) Quadrant Surface Parking Lot <ol style="list-style-type: none"> <li>1. Survey surface parking lot and service drive</li> <li>2. Re-stripe as necessary</li> <li>3. Improve aesthetics and safety</li> <li>4. Improve landscaping &amp; buffers</li> <li>5. Improve connectivity to the Circle</li> <li>6. Includes potential addition of public restroom facilities</li> </ol>	Identified in the Master Plan as a temporary measure until redevelopment proceeds	If applicable, 2009-2010	<ul style="list-style-type: none"> <li>• Consultant Fees - \$70K</li> <li>• Construction Cost - \$995K</li> <li>• Funding Source: City of Sarasota</li> </ul>
PC3	<b>Surface Parking Improvement Plans</b> South (Aqua) Quadrant Surface Parking Lot <ol style="list-style-type: none"> <li>1. Survey surface parking lot and service drive</li> <li>2. Re-stripe as necessary</li> <li>3. Improve aesthetics and safety</li> <li>4. Improve landscaping &amp; buffers</li> <li>5. Improve connectivity to the Circle</li> <li>6. Includes potential addition of public restroom facilities</li> </ol>	Identified in the Master Plan as a temporary measure until redevelopment proceeds	If applicable, 2009-2010	<ul style="list-style-type: none"> <li>• Consultant Fees - \$70K</li> <li>• Construction Cost - \$1.25M</li> <li>• Funding Source: City of Sarasota</li> </ul>
PC4	<b>Add Valet Parking/Hotel Loading Stations</b> <ol style="list-style-type: none"> <li>1. Re-stripe as necessary</li> <li>2. Proper signage</li> <li>3. Valet Kiosk</li> </ol>	Identified in the Master Plan and supported during Workshop #1 & #2 / LMR & City of Sarasota	2009	<ul style="list-style-type: none"> <li>• Consultant Fees – Included in PC2 and /or PC3</li> <li>• Construction Cost - \$10K</li> <li>• Funding Source: LMR &amp; City of Sarasota</li> </ul>

RO - Redevelopment Opportunities				
Strategy	Project Name/ Description	Source of Identified Need/ Responsible Party (RP)	Time Frame	Relative Capital Cost/ Potential Funding Sources
RO1	<p>Issue <b>RFP for Construction of a Multi-level Structured Parking</b> on the North (Gold) Quadrant that meets present &amp; future parking needs (5 level 650 +/- spaces)</p> <ol style="list-style-type: none"> <li>1. Includes appropriate streetscape improvements</li> <li>2. Includes public restroom facilities</li> </ol>	Identified in the Master Plan/Merchants Association & City of Sarasota	2009-2010	<ul style="list-style-type: none"> <li>• Construction Cost - \$17K per space</li> <li>• Funding Source: City of Sarasota</li> </ul>
RO2	<p>Provide Incentive Program for prospective developers. Issue <b>RFP for Public/Private Partnership for Redevelopment</b> of the South (Aqua) Quadrant.</p> <ol style="list-style-type: none"> <li>1. Alternate Use with Parking</li> <li>2. Improved connectivity to the Circle</li> <li>3. Adequate buffers and streetscape</li> <li>4. Includes public restroom facilities</li> </ol>	Identified in the Master Plan - Market Analysis to add needed parking and revitalize St. Armands/LMR & City of Sarasota	2009-2010	<ul style="list-style-type: none"> <li>• Funding Source: Private Development Community &amp; City of Sarasota (land transfer)</li> </ul>

SP – Sense of Place				
Strategy	Project Name/ Description	Source of Identified Need/ Responsible Party (RP)	Time Frame	Relative Capital Cost/ Potential Funding Sources
SP1	<p><b>St. Armands Design Manual</b> that accurately describes the St. Armands "image" and controls future aesthetic improvements</p> <ol style="list-style-type: none"> <li>1. Establishes, supports, and protects the St. Armands Image</li> <li>2. Assemble Design Review Board</li> <li>3. Develop Maintenance Program</li> </ol>	Identified in the Master Plan and supported during Workshops #1 & #2/ LMR & City of Sarasota	February '09	<ul style="list-style-type: none"> <li>• Consultant Fees - \$75K</li> <li>• Funding Source: Merchants Association &amp; City of Sarasota</li> </ul>
SP2	<p><b>FDOT Regulatory Signage Study</b></p> <ol style="list-style-type: none"> <li>1. Determine applicable regulatory signs</li> <li>2. Reduce sign clutter</li> <li>3. Implement changes identified</li> </ol>	Identified in the Master Plan/ Merchants Association & City of Sarasota	March '09 - June '09	<ul style="list-style-type: none"> <li>• Consultant Fees - \$25K</li> <li>• Funding Source: City of Sarasota</li> </ul>
SP3	<b>Burial of Powerlines</b> on John Ringling Boulevard approaching Circle and North Boulevard of the Presidents, including necessary curbing of roadway	Identified in the Master Plan and supported during Workshops #1 & #2/ LMR & City of Sarasota	In coordination with Streetscape Improvements and Wayfinding Improvements	<ul style="list-style-type: none"> <li>• Construction Cost - \$1M</li> <li>• Funding Source: City of Sarasota, LMR, and/or Grants</li> </ul>
SP4	<p><b>Wayfinding Improvement Plan</b></p> <ol style="list-style-type: none"> <li>1. Survey applicable roadways, storefronts, streetscape, and medians</li> <li>2. Includes Gateway at John Ringling Boulevard and North Boulevard of the Presidents</li> <li>3. Includes Directional Signs</li> <li>4. Includes Pedestrian Kiosks</li> <li>5. Includes Transition and Cue Zone Medians</li> <li>6. Includes Design Development drawings</li> </ol>	Identified in the Master Plan and supported during Workshops #1 & #2/ LMR & City of Sarasota  Includes Construction Documents and Permitting	Planning: March '09 - June '09  Construction: By Phase as Funding is available	<ul style="list-style-type: none"> <li>• Consultant Fees - \$140K</li> <li>• Construction Cost – TBD based on Final Design</li> <li>• Funding Source: City of Sarasota and possible TE funding on FDOT portions of roadway</li> </ul>
SP5	<p><b>Streetscape Improvement Plan</b></p> <ol style="list-style-type: none"> <li>1. ADA Compliance Study</li> <li>2. Establish pedestrian zone level of service</li> <li>3. Identify outdoor dining opportunities</li> <li>4. Includes district sidewalk improvements</li> <li>5. Includes landscape, hardscape, and furnishings along storefronts</li> <li>6. Includes (4) District Medians</li> <li>7. Crosswalk improvements</li> </ol>	Identified in the Master Plan and supported during Workshops #1 & #2/ LMR & City of Sarasota  Includes Construction Documents and Permitting	Planning: July '09 – November '09  Construction: By Phase as Funding is available	<ul style="list-style-type: none"> <li>• Consultant Fees - \$75K (Survey cost included in SP4)</li> <li>• Construction Cost – TBD based on Final Design</li> <li>• Funding Source: City of Sarasota and possible TE funding on FDOT portions of roadway</li> </ul>