

LONGBOAT KEY TOWN CENTER STEERING COMMITTEE

February 19, 2015



TODAY'S AGENDA



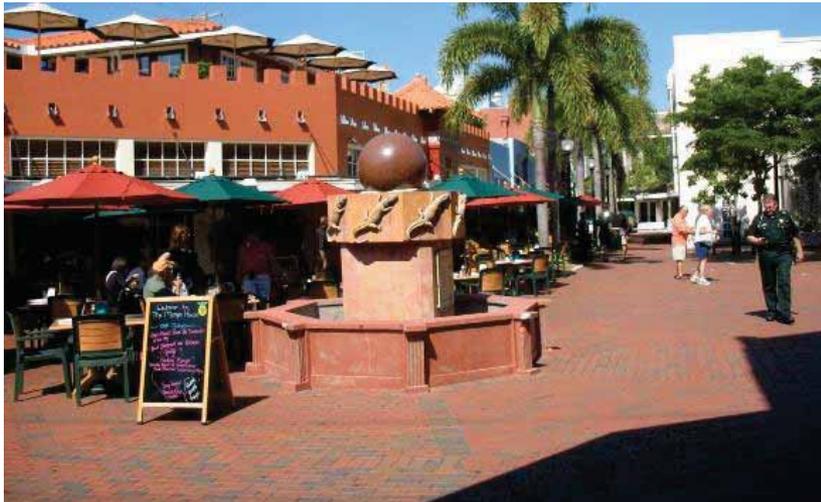
- Welcome and Introductions
- Project Overview
- Visual Preference Exercise
- Market Analysis Summary
- Next Steps / Timeline

PROJECT SCOPE AND PROCESS



Town Center Master Plan (PH I) and Overlay District (Ph II)

- Market Driven / Attracting Investment
- Walkable
- Mix of Uses (Commercial, Residential, Institutional)
- Potential to create a civic gathering space / cultural center



PROJECT SCOPE AND PROCESS



- Existing Conditions/Staff Workshop
- Steering Committee Questionnaire
- Workshop 1
- Stakeholder Interviews
- **Steering Committee 1 – Setting Concept Direction**
- Steering Committee 2 – Reviewing Concepts
- Workshop 2
- Town Commission Presentation

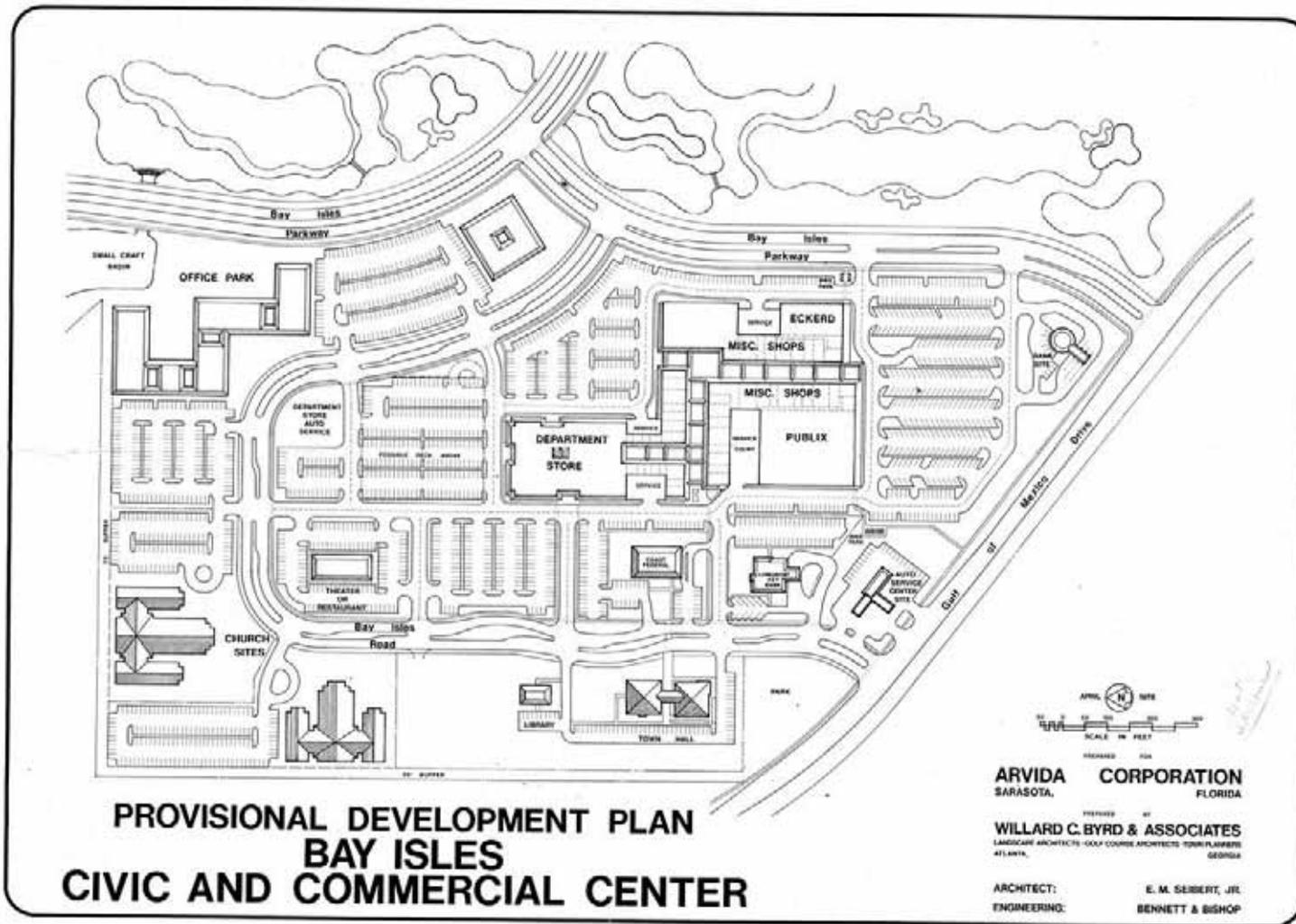
REDEVELOPMENT OF THE TOWN CENTER



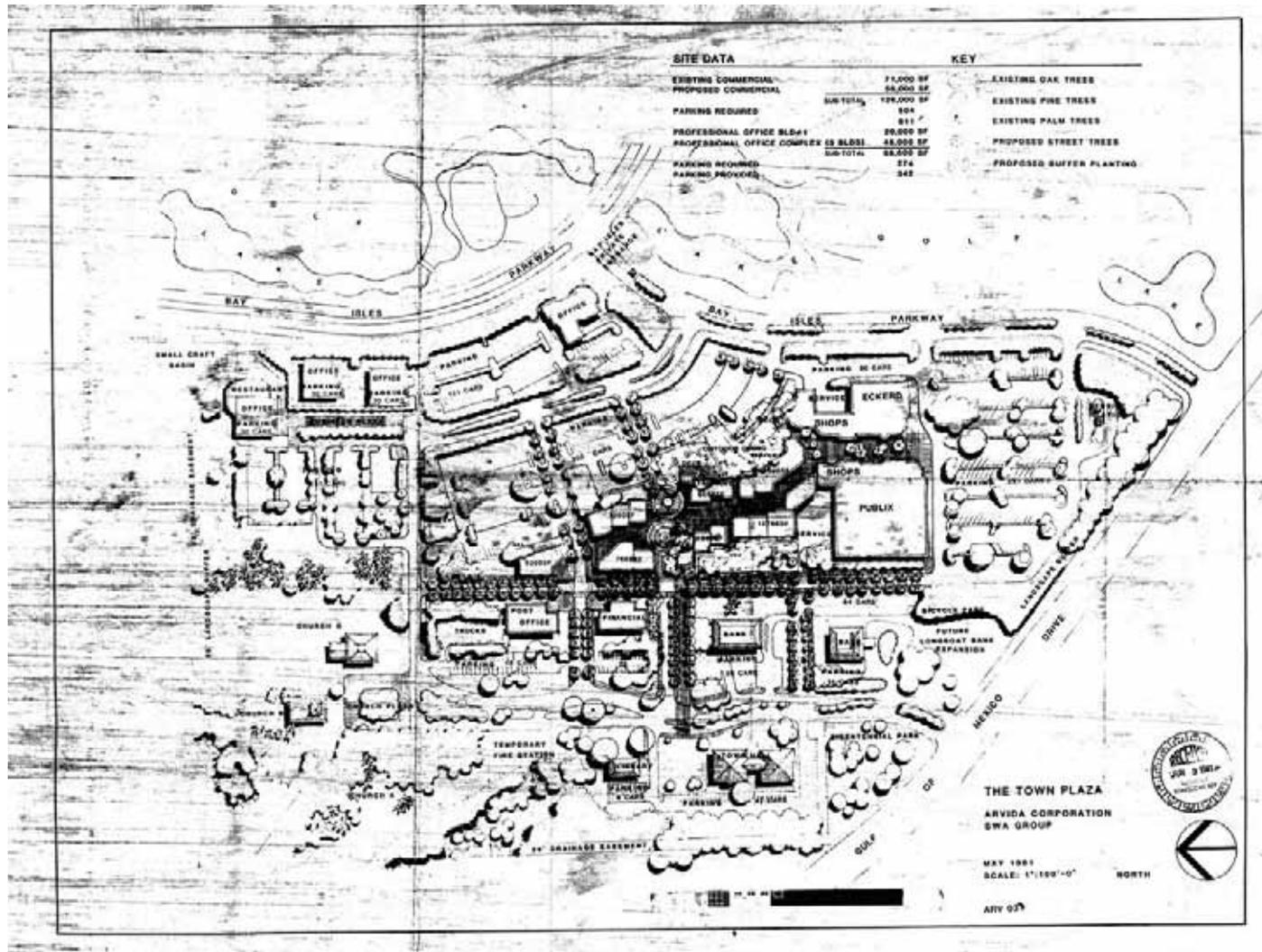
- Proactive – Property Acquisition, ULI Advisory Panel
- Create commercial activity and a community center
- Demographic changes and market challenges
- Plan for code update – start from the center
- This project is the next step – don't reinvent the wheel



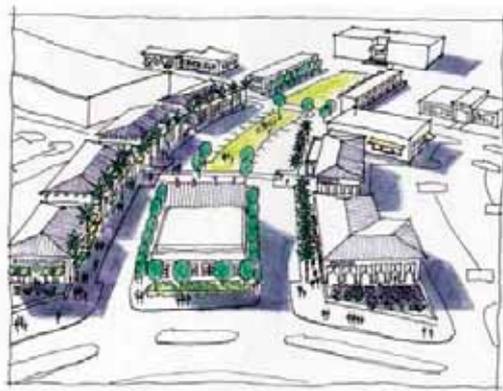
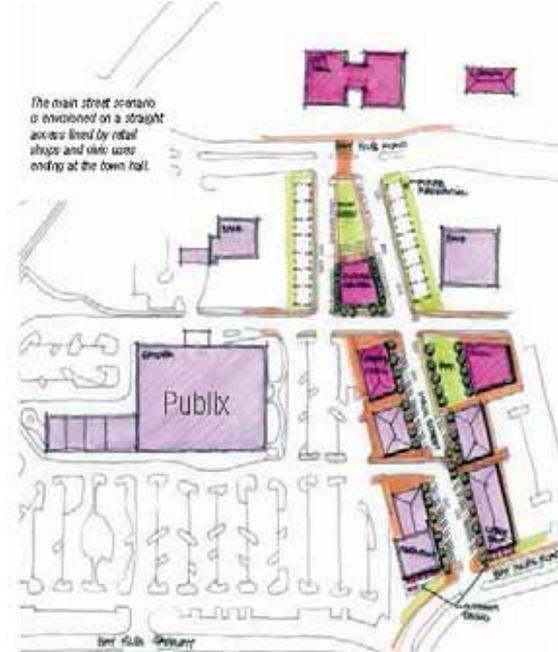
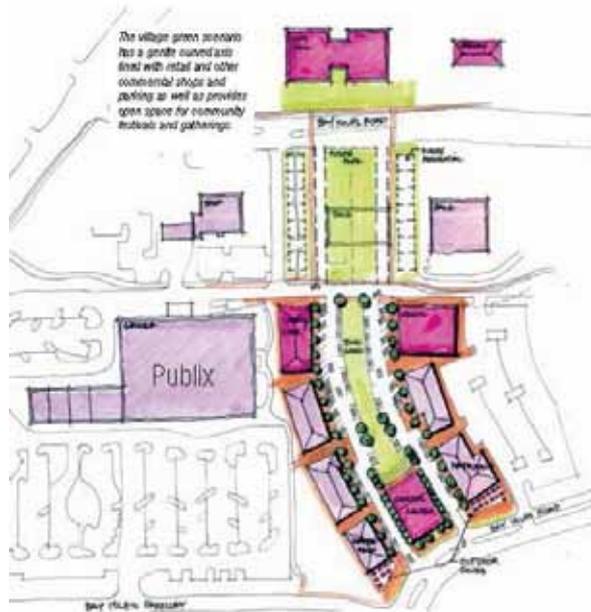
1978 TOWN CENTER CONCEPT



1981 TOWN CENTER CONCEPT



ULI ADVISORY PANEL CONCEPTS



The village green scenario allows for flexible open space and provides an opportunity to build a cultural center in a later phase.



Both the village green scenario and the main street scenario offer outdoor dining opportunities and

TOWN CENTER STUDY AREA



OWNERSHIP



CHALLENGES



OPPORTUNITIES



PUBLIC COMMENTS



- Existing uses serve the community well, but more diversity is needed
- Lack of public gathering spaces (parks, cultural centers, etc.)
- Lack of pedestrian connectivity to/within the Town Center
- Focus on essential/daily uses
- Support for some residential, some hesitation as to type
- Traffic is a concern
- Parking – is there enough?
- Transitions between neighboring uses are important
- Scale of new development – 2-3 stories max



VISUAL PREFERENCE EXERCISE

DESIRED LAND USES



Who are you?

1. Steering Committee Member – 13 (40.6%)
2. Audience Participant – 17 (53.1%)
3. Alien Life Form – 0 (0%)
4. Other - 2 (6.2%)



LAND USES

DESIRED LAND USES



What kinds of Commercial/Office/Retail uses would you like to see? (select up to 3)

1. Bars/Restaurants/Coffee Shops – 23 (30.67%)
2. Medical Offices / Doctor Offices – 15 (20%)
3. Gift Shops – 14 (18.67%)
4. Clothing Stores – 4 (5.33%)
5. Other Retail/Commercial/Office – 9 (12%)
6. Hotel/Motel – 3 (4%)
7. All of the above – 4 (5.33%)
8. None of the above – 3 (4%)

DESIRED LAND USES



What kinds of residential uses would you like to see?
(select up to 3)

1. Single Family Homes – 5 (8.93%)
2. Townhomes – 11 (19.64%)
3. Apartments – 13 (23.21%)
4. Condominiums – 14 (25%)
5. Timeshare – 1 (1.79%)
6. Assisted Living Facilities (ALF) – 12 (21.43%)
7. Other - 0
8. All of the Above - 0
9. None of the Above - 0

MULTIFAMILY



	Responses	
	Percent	Count
Very Positive	24.14%	7
Positive	13.79%	4
Neutral	20.69%	6
Negative	13.79%	4
Very Negative	27.59%	8
Totals	100%	29

MULTIFAMILY



Responses		
	Percent	Count
Very Positive	12.9%	4
Positive	22.58%	7
Neutral	25.81%	8
Negative	22.58%	7
Very Negative	16.13%	5
Totals	100%	31

MULTIFAMILY



Responses		
	Percent	Count
Very Positive	3.57%	1
Positive	32.14%	9
Neutral	10.71%	3
Negative	28.57%	8
Very Negative	25%	7
Totals	100%	28

MULTIFAMILY



Responses		
Percent	Count	
Very Positive	0%	0
Positive	20.69%	6
Neutral	27.59%	8
Negative	24.14%	7
Very Negative	27.59%	8
Totals	100%	29

MULTIFAMILY



Responses	
Percent	Count
Very Positive	3.85% 1
Positive	23.08% 6
Neutral	15.38% 4
Negative	30.77% 8
Very Negative	26.92% 7
Totals	100% 26

MULTIFAMILY



Responses		
	Percent	Count
Very Positive	0%	0
Positive	12.9%	4
Neutral	16.13%	5
Negative	22.58%	7
Very Negative	48.39%	15
Totals	100%	31

OFFICE



Responses		
	Percent	Count
Very Positive	6.9%	2
Positive	13.79%	4
Neutral	13.79%	4
Negative	34.48%	10
Very Negative	31.03%	9
Totals	100%	29

OFFICE



Responses		
	Percent	Count
Very Positive	3.23%	1
Positive	29.03%	9
Neutral	38.71%	12
Negative	12.9%	4
Very Negative	16.13%	5
Totals	100%	31

OFFICE



Responses		
	Percent	Count
Very Positive	0%	0
Positive	23.33%	7
Neutral	16.67%	5
Negative	23.33%	7
Very Negative	36.67%	11
Totals	100%	30

OFFICE



Responses		
	Percent	Count
Very Positive	7.41%	2
Positive	22.22%	6
Neutral	11.11%	3
Negative	25.93%	7
Very Negative	33.33%	9
Totals	100%	27

RETAIL



Responses	
Percent	Count
Very Positive	3.23% 1
Positive	35.48% 11
Neutral	35.48% 11
Negative	22.58% 7
Very Negative	3.23% 1
Totals	100% 31

RETAIL



Responses		
	Percent	Count
Very Positive	10.34%	3
Positive	51.72%	15
Neutral	24.14%	7
Negative	10.34%	3
Very Negative	3.45%	1
Totals	100%	29

RETAIL



Responses		
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Very Positive	12.9%	4
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Totals	100%	31

MIXED-USE



Responses		
	Percent	Count
Very Positive	3.12%	1
Positive	37.5%	12
Neutral	31.25%	10
Negative	12.5%	4
Very Negative	15.62%	5
Totals	100%	32

MIXED-USE



Responses		
Percent	Count	
Very Positive	6.25%	2
Positive	28.12%	9
Neutral	25%	8
Negative	25%	8
Very Negative	15.62%	5
Totals	100%	32

MIXED-USE



Responses		
	Percent	Count
Very Positive	3.45%	1
Positive	13.79%	4
Neutral	6.9%	2
Negative	41.38%	12
Very Negative	34.48%	10
Totals	100%	29

MIXED-USE



Responses		
	Percent	Count
Very Positive	0%	0
Positive	19.35%	6
Neutral	19.35%	6
Negative	25.81%	8
Very Negative	35.48%	11
Totals	100%	31

MIXED-USE



Responses		
	Percent	Count
Very Positive	6.67%	2
Positive	33.33%	10
Neutral	30%	9
Negative	6.67%	2
Very Negative	23.33%	7
Totals	100%	30



OVERALL CHARACTER

OVERALL CHARACTER



	Responses	
	Percent	Count
Very Positive	10.34%	3
Positive	37.93%	11
Neutral	31.03%	9
Negative	13.79%	4
Very Negative	6.9%	2
Totals	100%	29

OVERALL CHARACTER



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Positive	20.69% 6
Neutral	10.34% 3
Negative	41.38% 12
Very Negative	24.14% 7
Totals	100% 29

OVERALL CHARACTER



Responses		
	Percent	Count
Very Positive	3.12%	1
Positive	18.75%	6
Neutral	28.12%	9
Negative	40.62%	13
Very Negative	9.38%	3
Totals	100%	32

OVERALL CHARACTER



Responses		
Percent	Count	
Very Positive	12.12%	4
Positive	18.18%	6
Neutral	45.45%	15
Negative	12.12%	4
Very Negative	12.12%	4
Totals	100%	33

OVERALL CHARACTER



Responses		
Percent	Count	
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Negative	29.03%	9
Very Negative	16.13%	5
Totals	100%	31

OVERALL CHARACTER



	Responses	
	Percent	Count
Very Positive	0%	0
Positive	9.38%	3
Neutral	18.75%	6
Negative	43.75%	14
Very Negative	28.12%	9
Totals	100%	32

OVERALL CHARACTER



Responses	
Percent	Count
Very Positive	3.23% 1
Positive	6.45% 2
Neutral	6.45% 2
Negative	35.48% 11
Very Negative	48.39% 15
Totals	100% 31

OVERALL CHARACTER



	Responses	
	Percent	Count
Very Positive	3.12%	1
Positive	46.88%	15
Neutral	15.62%	5
Negative	21.88%	7
Very Negative	12.5%	4
Totals	100%	32



PUBLIC SPACES & RECREATION

PUBLIC SPACES



	Responses	
	Percent	Count
Very Positive	14.29%	4
Positive	35.71%	10
Neutral	25%	7
Negative	21.43%	6
Very Negative	3.57%	1
Totals	100%	28

PUBLIC SPACES



	Responses	
	Percent	Count
Very Positive	0%	0
Positive	6.9%	2
Neutral	27.59%	8
Negative	31.03%	9
Very Negative	34.48%	10
Totals	100%	29

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	6.67%	2
Positive	26.67%	8
Neutral	16.67%	5
Negative	23.33%	7
Very Negative	26.67%	8
Totals	100%	30

PUBLIC SPACES



	Responses	
	Percent	Count
Very Positive	6.45%	2
Positive	54.84%	17
Neutral	22.58%	7
Negative	12.9%	4
Very Negative	3.23%	1
Totals	100%	31

PUBLIC SPACES



	Responses	
	Percent	Count
Very Positive	18.75%	6
Positive	43.75%	14
Neutral	21.88%	7
Negative	9.38%	3
Very Negative	6.25%	2
Totals	100%	32

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	9.38%	3
Positive	62.5%	20
Neutral	18.75%	6
Negative	6.25%	2
Very Negative	3.12%	1
Totals	100%	32

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	15.62%	5
Positive	46.88%	15
Neutral	12.5%	4
Negative	18.75%	6
Very Negative	6.25%	2
Totals	100%	32

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	19.35%	6
Positive	48.39%	15
Neutral	22.58%	7
Negative	3.23%	1
Very Negative	6.45%	2
Totals	100%	31

PUBLIC SPACES



	Responses	
	Percent	Count
Very Positive	3.23%	1
Positive	35.48%	11
Neutral	35.48%	11
Negative	16.13%	5
Very Negative	9.68%	3
Totals	100%	31

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	0%	0
Positive	33.33%	10
Neutral	20%	6
Negative	33.33%	10
Very Negative	13.33%	4
Totals	100%	30

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	15.62%	5
Positive	56.25%	18
Neutral	15.62%	5
Negative	9.38%	3
Very Negative	3.12%	1
Totals	100%	32

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	15.15%	5
Positive	36.36%	12
Neutral	24.24%	8
Negative	21.21%	7
Very Negative	3.03%	1
Totals	100%	33

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	37.5%	12
Positive	34.38%	11
Neutral	18.75%	6
Negative	6.25%	2
Very Negative	3.12%	1
Totals	100%	32

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	16.13%	5
Positive	45.16%	14
Neutral	32.26%	10
Negative	3.23%	1
Very Negative	3.23%	1
Totals	100%	31

PUBLIC SPACES



Responses		
	Percent	Count
Very Positive	19.35%	6
Positive	45.16%	14
Neutral	22.58%	7
Negative	12.9%	4
Very Negative	0%	0
Totals	100%	31



STREETScape & PUBLIC REALM

BIKE / PED AMENITIES



Responses		
	Percent	Count
Very Positive	25.81%	8
Positive	48.39%	15
Neutral	19.35%	6
Negative	0%	0
Very Negative	6.45%	2
Totals	100%	31

BIKE / PED AMENITIES



	Responses	
	Percent	Count
Very Positive	12.9%	4
Positive	32.26%	10
Neutral	45.16%	14
Negative	3.23%	1
Very Negative	6.45%	2
Totals	100%	31

BIKE / PED AMENITIES



Responses		
	Percent	Count
Very Positive	15.62%	5
Positive	40.62%	13
Neutral	25%	8
Negative	12.5%	4
Very Negative	6.25%	2
Totals	100%	32

WAYFINDING/SIGNAGE



Responses		
Percent	Count	
Very Positive	0%	0
Positive	6.25%	2
Neutral	50%	16
Negative	25%	8
Very Negative	18.75%	6
Totals	100%	32

WAYFINDING/SIGNAGE



Responses		
	Percent	Count
Very Positive	6.25%	2
Positive	34.38%	11
Neutral	18.75%	6
Negative	18.75%	6
Very Negative	21.88%	7
Totals	100%	32

WAYFINDING/SIGNAGE



Responses		
	Percent	Count
Very Positive	3.23%	1
Positive	41.94%	13
Neutral	12.9%	4
Negative	22.58%	7
Very Negative	19.35%	6
Totals	100%	31

WAYFINDING/SIGNAGE



	Responses	
	Percent	Count
Very Positive	0%	0
Positive	25%	8
Neutral	31.25%	10
Negative	34.38%	11
Very Negative	9.38%	3
Totals	100%	32

WAYFINDING/SIGNAGE



Responses	
Percent	Count
Very Positive	3.12% 1
Positive	0% 0
Neutral	9.38% 3
Negative	59.38% 19
Very Negative	28.12% 9
Totals	100% 32

WAYFINDING/SIGNAGE



Responses		
	Percent	Count
Very Positive	12.12%	4
Positive	36.36%	12
Neutral	27.27%	9
Negative	15.15%	5
Very Negative	9.09%	3
Totals	100%	33

WAYFINDING/SIGNAGE



Responses		
	Percent	Count
Very Positive	6.06%	2
Positive	27.27%	9
Neutral	33.33%	11
Negative	27.27%	9
Very Negative	6.06%	2
Totals	100%	33

STREETSCAPE/PUBLIC REALM



Responses		
	Percent	Count
Very Positive	0%	0
Positive	43.75%	14
Neutral	53.12%	17
Negative	3.12%	1
Very Negative	0%	0
Totals	100%	32

STREETSCAPE/PUBLIC REALM



Responses		
	Percent	Count
Very Positive	3.12%	1
Positive	50%	16
Neutral	34.38%	11
Negative	12.5%	4
Very Negative	0%	0
Totals	100%	32

STREETSCAPE/PUBLIC REALM



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STREETSCAPE/PUBLIC REALM



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Negative	6.45%	2
Very Negative	0%	0
Totals	100%	31

STREETSCAPE/PUBLIC REALM



Responses		
	Percent	Count
Very Positive	15.15%	5
Positive	66.67%	22
Neutral	15.15%	5
Negative	3.03%	1
Very Negative	0%	0
Totals	100%	33

STREETSCAPE/PUBLIC REALM



	Responses	
	Percent	Count
Very Positive	6.25%	2
Positive	31.25%	10
Neutral	34.38%	11
Negative	18.75%	6
Very Negative	9.38%	3
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STREETSCAPE/PUBLIC REALM



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Very Positive	6.25%	2
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Neutral	34.38%	11
Negative	0%	0
Very Negative	3.12%	1
Totals	100%	32

STREETSCAPE/PUBLIC REALM



Responses	
Percent	Count
Very Positive	7.41% 2
Positive	7.41% 2
Neutral	37.04% 10
Negative	44.44% 12
Very Negative	3.7% 1
Totals	100% 27

STREETSCAPE/PUBLIC REALM



Responses		
	Percent	Count
Very Positive	16.13%	5
Positive	54.84%	17
Neutral	16.13%	5
Negative	12.9%	4
Very Negative	0%	0
Totals	100%	31

STREETSCAPE/PUBLIC REALM



Responses		
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Very Positive	6.67%	2
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STREETSCAPE/PUBLIC REALM



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STREETSCAPE/PUBLIC REALM



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Negative	16.13%	5
Very Negative	6.45%	2
Totals	100%	31

STREETSCAPE/PUBLIC REALM



Responses		
	Percent	Count
Very Positive	10.34%	3
Positive	51.72%	15
Neutral	10.34%	3
Negative	27.59%	8
Very Negative	0%	0
Totals	100%	29

STREETSCAPE/PUBLIC REALM



Responses		
	Percent	Count
Very Positive	3.33%	1
Positive	10%	3
Neutral	30%	9
Negative	23.33%	7
Very Negative	33.33%	10
Totals	100%	30

STREETSCAPE/PUBLIC REALM



Responses		
	Percent	Count
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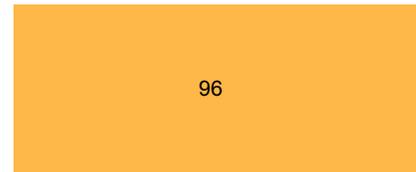
STREETSCAPE/PUBLIC REALM



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Positive	13.33%	4
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Totals	100%	30



BREAK TIME! (10 MINUTES)





MARKET STUDY FINDINGS

MARKET STUDY FINDINGS



- **Manatee & Sarasota Counties are projected to experience solid growth to 2040**
 - Manatee: 191,900 persons, 100,840 jobs
 - Sarasota: 114,120 persons, 94,690 jobs
- **Longboat Key: Marginal Growth, but considerable purchasing power**
 - 6,825 permanent residents, 12k-14k seasonals
 - 725 hotel units; 479,298 sf of retail, office, and mixed use; 305,598 square feet of recreational, institutional, civic, and government use
 - Just over 500 DUs and 80,000 square feet of commercial space have been developed since 1998

MARKET STUDY FINDINGS



- **Longboat Key: Marginal Growth, but considerable purchasing power (cont.)**
 - \$230.1 million in annual spending, but only \$51.8 million is occurring “on island”
 - With all of its affluence, Longboat is home to a substantial share of households with annual incomes of less than \$50,000
- **A large share of consumer expenditures are occurring “off island”**
 - St. Armand’s Circle
 - Sarasota
 - Bradenton
 - Anna Maria

MARKET STUDY FINDINGS



- **Case Study Analysis**

- Marco Island
- Sanibel/Captiva Island
- St. Simons Island
- Hilton Head Island

- **Case Study Findings**

- Comp barrier island communities do a better job of holding dollars “on island” than Longboat
- Comp barrier island communities also have well-defined mixed use activity centers that help keep people and spending on the island

MARKET STUDY FINDINGS



- **Conclusions**

- Purchasing power and demand is strong on the island
- The question at hand is whether or not the Town and residents want more commercial/nonresidential on the island, developed at an optimal scale/mix
- The alternative: Continue to go “off island” for shopping and services, avoid the pitfalls of creating on-island destinations/attractors
- The Town could easily accommodate a 50 percent expansion of its commercial inventory over the next 15 years

MARKET STUDY FINDINGS



- **Forecasts (to 2030)**

- Residential: 70 – 150 High Density Dus
- Commercial/Retail: 100,000 – 200,000 square feet
- Office: 20,000 – 50,000 square feet professional office
- Civic/Institutional: 20,000 – 50,000 square feet

PROJECT NEXT STEPS



- Development of preliminary concepts for Steering Committee Review
- Completion of utility assessment
- Completion of marketing positioning matrix
- Public Workshop #2



QUESTIONS/DISCUSSION

