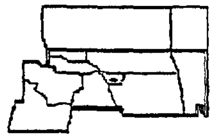
Maine : Coastal Zone Management Program

RANDOLPH (TOWN OF)
REVITIALIZING DOWNTOWN RANDOLPH

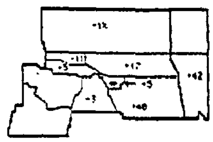
APR 1986

APRIL 1986

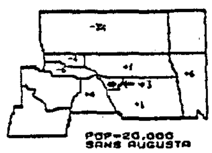
PRIMARY & SECONDARY TRADE



GROWTH, LAST DECADE



GROWTH, THIS DECADE



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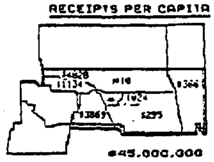
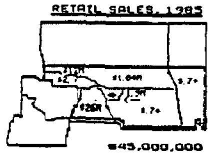


RETAIL SALES, 1985



REVITALIZING DOWNTOWN RANDOLPH

Sandwich Research Group Inc.

Sandwich Research Group Inc.

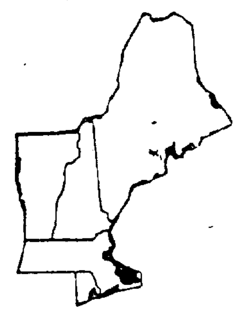
An Introduction

Based in Center Sandwich, New Hampshire, the Sandwich Research Group provides comprehensive market analysis, strategic planning and research consulting services to industrial, financial, real estate and governmental organizations. Using extensive in-house reference resources, the Sandwich Research Group responds also to the specialized research needs of both public and private clients.

Founded in 1980, the Sandwich Research Group is structured to maximize personal attention from experienced professionals in each service area, and to ensure affordable, competitive consulting costs.

The firm combines knowledge in market research with a genuine feel for eastern United States marketplaces. Its principals are dedicated to the fact-finding, problem-solving and benchmark research which provide our clients with comprehensive and practical information for decision-making.

- *Industrial & Consumer Market Research*
- *Strategic Market Planning*
- *Research In Banking*
- *Real Estate Development Consulting*
- *Community Development Planning*
- *Information and Data Support Services*



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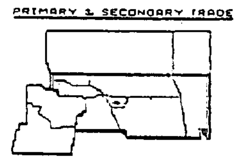

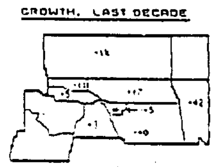

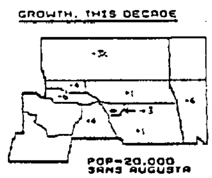

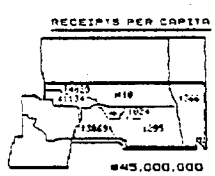

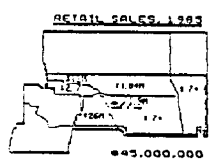

REVITALIZING DOWNTOWN RANDOLPH

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"Financial assistance for preparation of this document was provided by a grant from Maine's Coastal Program through Funding provided by U.S. Department of Commerce, Office of Ocean and Coastal Resource Management, under the Coastal Zone Management Act of 1972, as amended.

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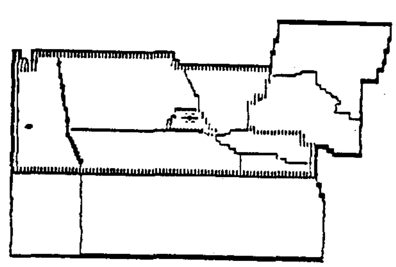

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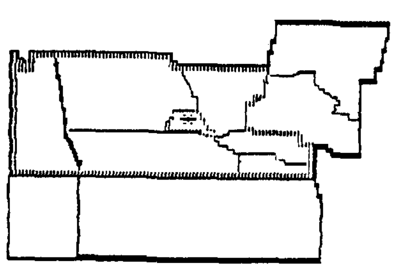


F O R E W O R D

R E V I T A L I Z I N G   D O W N T O W N   R A N D O L P H

1. I N T R O D U C T I O N

Towns, like their dwellers, experience life cycles. Or, in an even closer analogy, towns course through cycles quite similar to those of consumer products -- introduction, growth, maturity and decline.

Recognition that one cycle is playing out, and acting to establish the next cycle, are the keys to revitalization. For towns -- not unlike products -- the primary tools after the situation is analyzed are investment and marketing.

Randolph's existing Water Street economy meets too few of its users' needs -- users who include local enterprise as well as consumers and recreational enthusiasts. Nature, public policy and technology have converged to produce the existing situation.

Among the key contributors to this situation are the following:

- *Not unlike the declining downtowns in more urban sites, Randolph's commercial environment failed to adapt to the automobile, a catalyst in shifted consumer habits. Consider the fact that, before the Depression, \$9 of every \$10 in consumer transactions occurred in a central business district in the United States. This ratio has very nearly reversed since then.*

- *The price paid for Federal insurance of structures along the Kennebec River flood plain limits rehabilitation and building. Because the flood zones and shorefront zoning span most of the existing commercial district in Randolph, the replacement of buildings demolished over the years is limited.*

- *The volume of traffic passing through Randolph both provides and divides. More than 8,000 vehicles a day provide the potential for greatly expanded convenience or specialty retail sales. The same file of vehicles makes Water Street a pedestrian hazard.*

- *The loss of architectural unity -- including demolition -- is compounded by the widening of the highway to rob Randolph of integration and identity. This void must be filled by visual means and by planning for a more receptive environment that looks to the personal scale, not the vehicular.*

- *Limited space for potential development. Change will require the concerted effort of existing property owners in the designated central business district.*

These other basic points about Randolph can be made:

o The town must accept the constraints of flood plain zoning and combine structures remaining with imaginative adaptation of alternatives.

o The town's image demands positive focus. Establishing an image is a distinct marketing asset which is very difficult to recreate anew, but Randolph must seek to do so.

o Randolph must address a limited existing economic infrastructure, expanding that infrastructure by developing a convenience and recreational economy and by stimulating year-round local and commuter demand and support. These can be achieved through riverfront recreation and through the realignment of the retail sector into a better-circulating, more accessible retail environment dedicated to convenience.

o Light industry is not infeasible, but limited space and better use of the downtown diminish its advent in the target district.

o The town must expand the Main Street economy for the sake of not only a broader tax base, but also to provide jobs for townspeople, including residents who remain low-income and find commuting a hardship. Expansion of population and commercial competition in surrounding towns suggest that the time to act is now.

2. AVENUES OF RESEARCH

In early 1986, the town government and Randolph's active community development association moved to sponsor a study of the economy and the commercial potential of Randolph's downtown target area.

> For more than two months, the town was studied by researchers, who found a community endowed with exceptional natural resources and a strong community commitment to improving the physical and economic features of the town, but with some severe problems to be overcome in accomplishing these goals.

The consultants found a downtown economy largely in limbo, serving minimum daily needs of the local and transient population. For most Randolph residents, work and shopping occur in neighboring towns.

The study's sponsors called for 12 specific tasks to be accomplished in the study.

2.1 Business & Homeowner Surveys

All persons operating a business or owning property within the defined Water Street target district were surveyed to assess their level of business activity (if any), their plans for the future and their sense of the town economy's needs, assets, deficits and outlook.

Questionnaires were distributed to the more than 20 businesses in town. In all, 12 of them were either interviewed or returned written surveys. The 12 represent the bulk of commercial volume in the downtown.

Most businesses operate along Water Street, the main artery through town and along the Kennebec River. The central business district, usually designated in such reports as the CBD, has limited retail and service activity, much of it convenience. Business operators tended to have been in town for several decades, although several vacant commercial buildings represent recent departures of concerns.

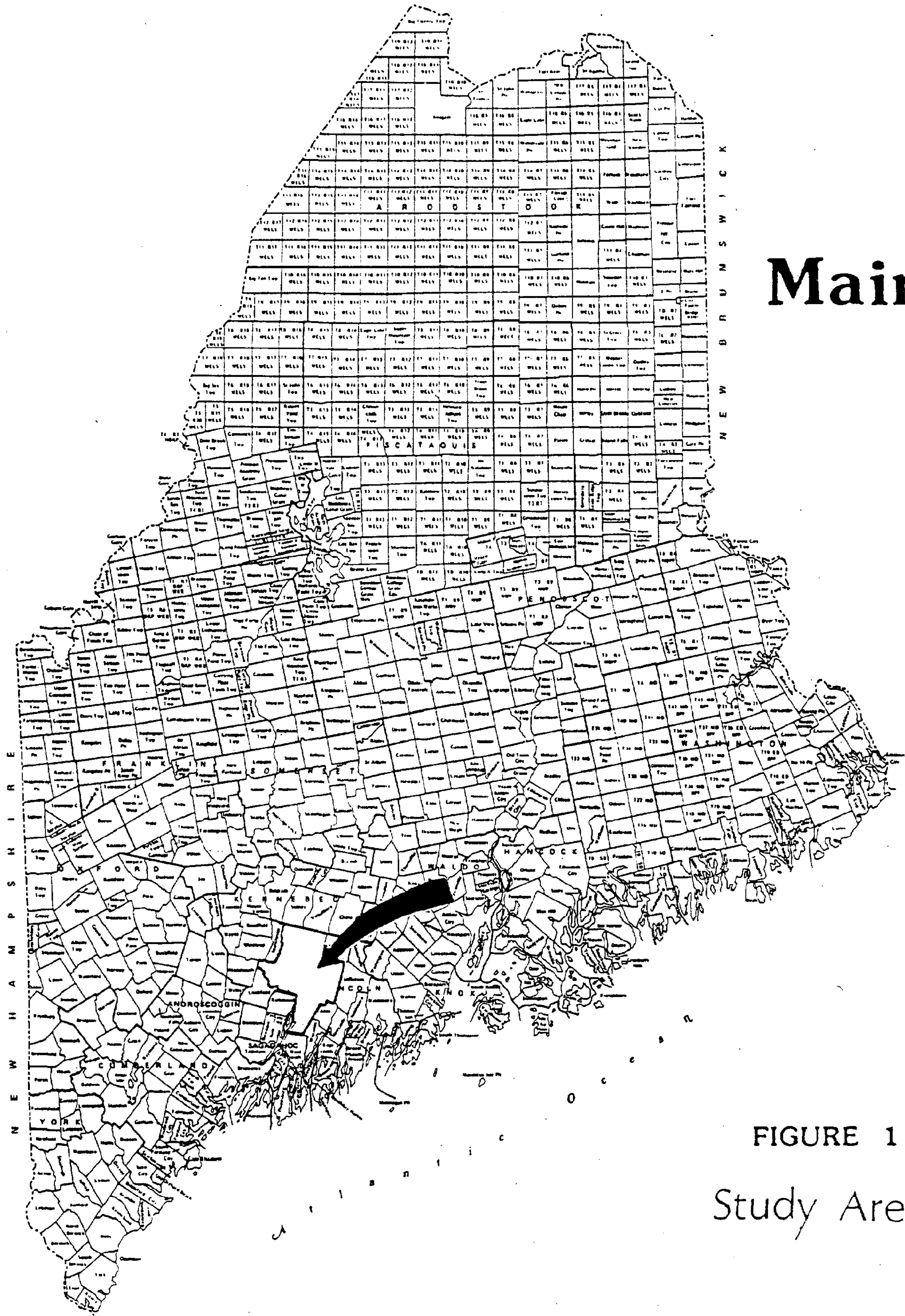
There has been stability of ownership in the central business district. Absentee ownership is almost non-existent.

Owners of 35 properties in the core area were surveyed to establish both their views on needed downtown change and their plans for any changed use of their properties. Most of the properties were residential, with few expectations for change to non-residential use.

2.2 Area Consumer Surveys

Who are the shoppers and visitors to Randolph's commercial area? Why are they there? What do they think?

Because appropriate conclusions in research are always linked to the question, "Compared to what?," shopper/visitor surveys were conducted not only on Water Street (the main street) in Randolph, but also in Gardiner and Augusta, nearby competitive markets.



Maine

FIGURE 1

Study Area

During several shopping days, on weekends as well as weekdays, 241 persons were interviewed by community volunteers for an average of 15 minutes in an effort to answer those questions with validity.

Respondents in and out of town were alike in terms of their residency profiles -- few were tourists or transient. There were some differences in age and tenure in the area, with the Randolph component's having a somewhat younger profile.

Not surprisingly, Gardiner is the locus for most of the usual household shopping needs of the Randolph populace, although there was a striking inclination among those visiting the Randolph center to do so daily. Half of those found downtown in Randolph were from the region, a figure which concurred with merchants' evaluations of their clientele.

A greater variety of shops, a restaurant and a bank were among the offerings shoppers most frequently wanted to see in Randolph; local shoppers/visitors mentioned a mix more suited to regular household needs, while "outsiders" saw Randolph as a potential place for more specialized shops and recreation.

The town's greatest assets are its location, the river, and traffic volume.

The town's greatest deficits include its image as a place where nothing happens.

2.3 Space Inventory & Analysis

Commercial buildings/properties were surveyed to determine their use, potential for re-use and rehabilitation.

The survey found more than 30,000 square feet of active commercial space, all of it on the first floor. Another 20,000 square feet of vacant commercial space -- most of it in one-story buildings -- exists in the total Water Street span.

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The vast majority of commercial space -- active and inactive -- is in the half-mile span designated by researchers as the primary commercial district for Randolph. Future retail development should concentrate in this area.

==

Most of the structures remaining in the commercial district are sound. Exterior presentation is generally uncommanding and without architectural unity, although several handsome buildings -- most of them residential and located just outside of the core district -- suggest the value of historic registry applications by owners.

Floodplain restrictions severely limit new construction on currently vacant sites. Historic registry structures however, do not come under the constraints, and new structures may replace existing ones.

Both buildings in current commercial use and those potentially convertible to such use were reviewed. Rehabilitation of the most dilapidated buildings is feasible -- but required flood protection measures expands the average rehabilitation cost, although possibly to less than new commercial building construction costs, which range from $35 to $65 a square foot.

Many buildings would benefit from facade improvement. The same square footage developed under new construction would approach at least $2.5 million.

Any building/renovation program should capitalize on a theme. Rather than devise a "period" (such as Victorian) or "use" theme (such as nautical), a series of architecturally integrating devices could be used, among them

- *signs;*
- *awnings;*
- *brick walkways and malls;*
- *landscaping.*

Because vacant lots in the study area link existing commercial sectors, serious attention should be paid to the potentially unifying (or disruptive) capability of development on that land.

The vacant sites must be integrated into the commercial district. Put more conventionally, a commercial expanse with such voids can be likened to a mouth with missing teeth: the image is diminished.

2.4 Trade: Boundaries & Outlook

Because of its proximity to other retail centers, Randolph's primary trading area radius is only one-fifth of a mile. Competition for goods and services are limited, in the researchers', view to convenience and specialty establishments.

The word "competition" is derived from the Latin root "to seek." It implies rivalry and promotion in seeking out the consumer.

Randolph does not currently compete effectively for any targeted market within its trading area, which has been defined as a seven-town region with a year-round population of 20,000 (40,000 if Augusta is included.)

> Its commercial district does not accommodate residents' basic household consumption needs year-round, other than groceries, heating and a laundry/cleaner. The existing mix of goods and services in Randolph does not adequately capture either the regional commuter market or the significant recreational segment, despite heavy traffic volume through town.

Because of competition for shoppers' goods in Augusta and household goods in Gardiner, Randolph's economy must seek to establish a differentiated business base, one which combines convenience with some form of specialization in shopping, services and river-oriented amenities.

Research has evaluated the market draw, sales leakage, worker support, promotion and business mix, among other things, to establish competitive measures and potential.

Randolph is physically, if not commercially, positioned to capture more of the consumer market. Its location is on a major highway which already accommodates the traffic which could be diverted to participate in Randolph's commercial offerings. Traffic and parking are not considered impediments to Randolph's commercial growth in the forseeable future.

Despite some articulation of the removal of the Randolph commercial district off of Water Street (Route 27), both sentiment and hard numbers suggest that the location of a business district on Water Street remains a premier site.

More than $4 million in retail trade/service revenues are generated along that street by the existing business establishments, with a significant proportion of retail sales to non-Randolph residents.

Expanded revenues from improvement and from addition of several new businesses are put at another $3 million.

Current full-time employment is around 50 persons. Expansion of active commercial space by another 15,000 square feet would generate an estimated 24 new jobs, with another 25 permanent jobs generated by overall improvements in the economy.

The question arises of how to create a climate for this expansion. What are the critical factors structuring and affecting private investment in Randolph?

The potential for outside investment in a community is keenly tied to the local investment climate. "Fresh money" is the nutrient for economic expansion, and its application usually requires local spadework and commitment, of which Randolph has an ample supply.

Lenders appear equivocal about Randolph, but express guarded optimism about its future as interest in the community appears to be accelerating.

A reading of lassitude within the downtown economy and what one citizen called "reactive zoning" may also discourage investment in the community.

The zoning comment reflects the chaotic nature of the town's zoning regulations, which tend to address use but -- except on the riverfront -- not the planning which can help shape long-term development. Randolph must articulate what sort of a community it wishes to be in 20 years, and plan accordingly.

Without clearer codification of land use regulations, Randolph generates uncertainty over the long-term use of a neighborhood, a factor which may discourage both individual and commercial investment in Randolph.

Property costs have remained relatively low in Randolph, a reflection of soft demand. Current and post-revitalization rental cost of commercial and office space is, and would be, regionally competitive. The current presentation of much commercial space is not suitable for more than convenience rental, in which image is not a major factor.

2.5 Opportunity & Recommendations

The consultants believe that one should not look for problems, but, rather, opportunities.

From the previous tasks, both projections and a downtown improvement strategy have been developed. Investment resources have been evaluated, and a series of specific programs are proposed in the final chapter of this report.

Recommendations have been proferred for:

o Marketing. This is a vital element in the development of the downtown economy. But first, Randolph must have more to market. The advent of the town's 100th anniversary in 1987 must be considered a very valuable marketing asset.

o Public Investment. Public funding exists to encourage private investment and further the development of the downtown to the benefit of all members of the community. The consultants believe the town should continue to seek these monies. But we recommend that the town consider them as leveraging tools, supplements to self-motivation and commitment by the town, its citizens and regional financial services institutions.

Without town commitment to revitalization using privately committed funds and sweat equity, efforts to improve the local economy will falter.

o Private Investment. This is the crucible of redevelopment in downtown Randolph. There is some evidence of private investor interest in town as properties change hands.

The most likely investors include those with investments in current commercial property; include developers with experience in maximizing the financial benefits of underutilized sites; those who find the relatively lower purchase cost of Randolph property able to compensate for the often higher cost of improvement due to flood insurance restrictions; and those community organizations and residents whose interest in economic growth in the town brings them to act as informal promoters and brokers.

o Economic Trends. Events which would encourage revitalization downtown include the continued population growth of towns surrounding Randolph, the expanded promotion of Gardiner's rehabilitated downtown and of the river, expansion of the industrial base in Augusta and continued national economic expansion. All should contribute to the successful revitalization of the downtown.

Recession, further cuts in public redevelopment projects or retrenchment in historic rehabilitation incentives, inflation and public apathy would act to counter advances in redevelopment.

o Regulation. Redevelopment entails some attention to regulations. Zoning clarifications are recommended, including sign regulations.

3. APPLYING THE FINDINGS

The tasks described above are addressed in six chapters and several appendices, along with research and analysis considered complementary to them and useful for decision-making and marketing.

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This report is designed to be read by both the sponsors and by the public, including potential investors. A summary format prior to each chapter accompanies the detailed analysis for those wishing a brief review.
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The findings are presented in the following categories:

- General characteristics of the population of Randolph and the region;
- Characteristics of the marketplace of Randolph and region;
- Profile of the Randolph commercial district;
- Profile of the customer base -- both local and otherwise;
- Attitudes toward Randolph and its economy; and
- Recommendations.

Researchers prepared maps depicting the region's and town's demographic, economic and commercial characteristics for inclusion in the text. *Color transparencies of each building were taken during the inventory phase.*

A summary slide show of this study is being made available to the town to allow presentation of the findings in the future. Video tapes of the public presentation of recommendations held April 7 are available also.

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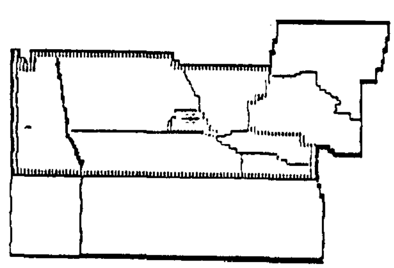
Tables



RANDOLPH, MAINE

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MIGRATION TRENDS 1980 - 1984

TABLE 1

Randolph Trading Area

	Pop. 1980	Births '81-'84	Deaths '81-'84	Natural: Gain	Pop. 1984	Pop. Gain	In-Mig As: % Of Gain	Net Migra	% Pop. Increase
RANDOLPH	1834	107	63	66	1884	50	0.00	-16	0.03
% of Region	0.05	0.04	0.04	0.08	0.05	-0.28		0.02	
Augusta	21819	1289	1025	321	21142	-677	0.00	-998	-0.03
% of Region	0.54	0.53	0.59	0.40	0.53	3.76		1.01	
Chelsea	2522	89	60	32	2536	14	0.00	-18	0.01
% of Region	0.06	0.04	0.03	0.04	0.06	-0.08		0.02	
Dresden	998	71	32	39	1123	125	0.69	86	0.11
% of Region	0.02	0.03	0.02	0.05	0.03	-0.69		-0.09	
Farmingdale	2535	116	87	37	2390	-145	0.00	-182	-0.06
% of Region	0.06	0.05	0.05	0.05	0.06	0.81		0.18	
Gardiner	6485	482	299	184	6765	280	0.34	96	0.04
	0.16	0.20	0.17	0.23	0.17	-1.56		-0.10	
Pittston	2267	119	98	40	2286	19	0.00	-21	0.01
	0.06	0.05	0.06	0.05	0.06	-0.11		0.02	
Somerville	377	25	4	21	425	48	0.56	27	0.11
	0.01	0.01	0.00	0.03	0.01	-0.27		-0.03	
Whitefield	1606	125	57	68	1712	106	0.36	38	0.06
	0.04	0.05	0.03	0.08	0.04	-0.59		-0.04	
TOTAL	40443	2423	1725	808	40263	-180	0.00	-988	-0.00

Source: Maine Department of Human Services
Southern Kennebec Planning and Development Council
Sandwich Research Group

Sandwich Research Group Inc.

MIGRATION TRENDS

1970 - 1979

TABLE 2 Randolph Trading Area

	Pop. 1970	Births '70-'79	Deaths '70-'79	Natural Gain	Pop. 1980	Pop. Gain	In-Mig As: % Of Gain	Net Migra	% Pop. Increase
RANDOLPH	1741	267	196	71	1834	93	0.24	22	0.05
% of Region	0.05	0.04	0.05	0.04	0.05	0.05		0.01	
Augusta	21945	3270	2317	953	21819	-126	0.00	-1079	-0.01
	0.58	0.53	0.54	0.51	0.54	-0.07			
Chelsea	2154	275	142	133	2522	368	0.64	235	0.17
	0.06	0.04	0.03	0.07	0.06	0.21		0.15	
Dresden	787	134	98	36	998	211	0.83	175	0.27
	0.02	0.02	0.02	0.02	0.02	0.12		0.11	
Farmingdale	2423	302	213	89	2535	112	0.00	23	0.05
	0.06	0.05	0.05	0.05	0.06	0.06		---	
Gardiner	6685	1302	873	429	6485	-200	0.00	-629	-0.03
	0.18	0.21	0.20	0.23	0.16	-0.11		---	
Pittston	1617	272	180	92	2267	650	0.86	558	0.40
	0.04	0.04	0.04	0.05	0.06	0.37		0.36	
Somerville	215	49	25	24	377	162	0.85	138	0.75
	0.01	0.01	0.01	0.01	0.01	0.09		0.09	
Whitefield	1131	278	223	55	1606	475	0.88	420	0.42
	0.03	0.05	0.05	0.03	0.04	0.27		0.27	
TOTAL	37911	6149	4267	1882	40443	1745	-0.08	-137	0.05

TABLE 3

Randolph Trading Area

UNIT TYPE	RANDOLPH N=	RANDOLPH AREA	Augusta N=	Augusta AREA	Chelsea N=	Chelsea %	Dresden N=	Dresden 436	Farmingdale N=	Farmingdale %
Single Family	465	0.06	4567	0.55	584	0.07			677	0.08
Multi Family	193	0.04	3957	0.75	21	0.00			179	0.03
Manufactured Home	33	0.04	415	0.45	112	0.12			101	0.11
TOTAL FOR TOWN	691	0.05	8939	0.62	717	0.05			957	0.07

Source: US Census
Sandwich Research Group

UNIT TYPE	Gardiner N=	Gardiner %	Pittston N=	Pittston %	Somerville N=	Somerville 198	Whitefield N=	Whitefield 599	TOTAL N=
Single Family	1431	0.17	587	0.07					8311
Multi Family	920	0.17	14	0.00					5284
Manufactured Home	138	0.15	129	0.14					928
TOTAL FOR TOWN	2489	0.17	730	0.05					14523

HOUSING UNITS BY TYPE

AGE DISTRIBUTION

198Ø

TABLE 4 Randolph Trading Area

AGE	RANDOLPH N=	RANDOLPH % Town	Augusta N=	Augusta % Town	Chelsea N=	Chelsea % Town	Dresden N=	Dresden % Town	Farmingdale N=	Farmingdale % Town
0 - 4	121	0.07	1420	0.07	167	0.07	94	0.09	156	0.06
5 - 17	409	0.22	4229	0.19	587	0.23	198	0.20	565	0.22
18 - 21	110	0.06	1518	0.07	114	0.05	41	0.04	126	0.05
22 - 29	242	0.13	3042	0.14	283	0.11	126	0.13	257	0.10
30 - 44	328	0.18	3928	0.18	508	0.20	186	0.19	543	0.21
45 - 54	222	0.12	2239	0.10	280	0.11	137	0.14	300	0.12
55 - 64	188	0.10	2274	0.10	322	0.13	100	0.10	288	0.11
65+	214	0.12	3169	0.15	261	0.10	116	0.12	300	0.12
TOTA_	1834		21819		2522		998		2535	

AGE	Gardiner N=	Gardiner % Town	Pittston N=	Pittston % Town	Somerville N=	Somerville % Town	Whitefield N=	Whitefield % Town	AREA N=
0 - 4	516	0.08	167	0.07	23	0.06	150	0.09	2814
5 - 17	1345	0.21	550	0.24	96	0.26	395	0.25	8374
18 - 21	444	0.07	111	0.05	26	0.07	75	0.05	2565
22 - 29	845	0.13	254	0.11	66	0.18	153	0.10	5268
30 - 44	1211	0.19	490	0.22	84	0.22	379	0.24	7657
45 - 54	637	0.10	223	0.10	30	0.08	118	0.07	4186
55 - 64	569	0.09	207	0.09	31	0.08	163	0.10	4142
65+	918	0.14	265	0.12	20	0.05	173	0.11	5436
TOTAL	6485		2267		376		1606		40442

Source: US Census
Sandwich Research Group

TABLE 5

Randolph Trading Area

YEARS OF SCHOOL COMPLETED	RANDOLPH		Augusta		Chelsea		Dresden		Farmingdale		Gardiner		Pittston		Somerville		Whitefield		TOTAL	
	N=	%	N=	%	N=	%	N=	%	N=	%	N=	%	N=	%	N=	%	N=	%	N=	%
To 8th Grade	202	0.18	2939	0.22	400	0.25	---	0.00	186	0.12	654	0.17	242	0.18	---	0.00	---	0.00	4623	0.15
High School 1-3	165	0.15	1706	0.13	298	0.19	259	0.37	231	0.15	668	0.17	236	0.17	103	0.40	335	0.32	4001	0.13
Subtotal	367	0.33	4645	0.35	698	0.44	259	0.37	417	0.26	1322	0.34	478	0.35	103	0.40	335	0.32	8624	0.27
High School 4 yr	522	0.47	4798	0.36	630	0.40	239	0.34	635	0.40	1495	0.39	598	0.44	95	0.37	398	0.38	9410	0.30
College 1-3 yrs.	154	0.14	1971	0.15	142	0.09	85	0.12	279	0.18	503	0.13	156	0.12	28	0.11	170	0.16	3488	0.11
College 4+ yrs.	64	0.06	2037	0.15	106	0.07	123	0.17	254	0.16	527	0.14	120	0.09	31	0.12	158	0.15	3420	0.11
Subtotal	218	0.20	4008	0.30	248	0.16	208	0.29	533	0.34	1030	0.27	276	0.20	59	0.23	328	0.31	6908	0.22
Town % College Grads, Region	0.03		0.58		0.04		0.03		0.08		0.15		0.04		0.01		0.05			
TOTAL	1107		13451		1576		706		1585		3847		1352		257		1061		31850	

Sandwich Research Group Inc.

EDUCATIONAL PROFILE

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INCOME DISTRIBUTION

TABLE 6 Randolph Trading Area

Families with...	RANDOLPH	Augusta	Chelsea	Dresden	Farmingdale
No workers (%)	0.14	0.14	0.10	0.22	0.10
N=	70	808	59	66	66
Mean Income	9611	10826	7548	5336	8676
Income Generated	672770	8747408	445332	352176	572616
Single Worker (%)	0.31	0.29	0.38	0.33	0.31
N=	159	1643	220	99	213
Mean $$	13356	16686	15176	12453	17858
Income Generated	2123604	27415098	3338720	1232847	3803754
Two-Plus Workers (%)	0.56	0.57	0.52	0.46	0.60
No. Families	286	3237	300	139	414
Mean $$ Per Fam.	20952	22897	20041	23057	25684
Income Generated	5992272	74117589	6012300	3204923	10633176
Primary Worker Avg	13177	14401	12604	14501	16153
Second-Income Avg	7775	8496	7437	8556	9531
TOTALS Families	515	5688	579	304	693
% Families	0.05	0.54	0.05	0.03	0.07
Total Income '80	8788646	1.1028E8	9796352	4789946	15009546
Projected '83	12437550	1.6145E8	14925000	7126350	20229650
% Change	0.42	0.46	0.52	0.49	0.35
Per Capita $$ '80	4792	5054	2666	4800	5921
Per Capita $$ '83	6723	7688	5970	6787	8257
% Area Income =	0.04	0.56	0.05	0.02	0.08
% Area Pop =	0.04	0.52	0.09	0.02	0.06
% Area Labor =	0.04	0.54	0.07	0.02	0.07
Town Pop =	1834	21819	3674	998	2535
Work Force =	845	10366	1305	448	1240
# Women Work =	349	4578	373	182	479
% Women In LF =	0.41	0.44	0.29	0.41	0.39

Area Income in 1980 From Above Data ($000) 197622
Area Income in 1983 -- Estimated ($000) 287221

Source: U.S. Census
Sandwich Research Group
Maine Dept. of Human Services
So. Kennebec Planning & Development Council

TABLE 6 cont. Randolph Trading Area

Families with...	Gardiner	Pittston	Somerv'le	Whitefield	T O T A L
No workers (%)	0.10	0.10	0.17	0.11	0.13
N=	173	57	17	44	1360
Mean Income	10278	8438	2996	6624	7815
Income Generated	1778094	480966	50932	291456	13391750
Single Worker (%)	0.34	0.31	0.35	0.33	0.32
N=	564	186	34	133	2985
Mean $$	15769	14851	8031	12178	14040
Income Generated	8893716	2762286	273054	1619674	41908737
Two-Plus Workers (%)	0.56	0.59	0.48	0.56	0.55
No. Families	921	356	47	226	5653
Mean $$ Per Fam.	22075	20118	16641	20052	21280
Income Generated	20331075	7162008	782127	4531752	1.2029E8
Primary Worker Avg	13884	12653	10466	12611	13383
Second-Income Avg	8191	7465	6175	7441	7896
TOTALS Families	1658	599	98	403	10537
% Families	0.16	0.06	0.01	0.04	
Total Income '80	31002885	10405260	1106113	6442882	1.9762E8
Projected '83	45825150	13992750	1690000	9546900	2.8722E8
% Change	0.48	0.34	0.53	0.48	0.45
Per Capita $$ '80	4781	4590	2942	4012	4751
Per Capita $$ '83	6891	6219	4225	5786	7217
% Area Income =	0.16	0.05	0.01	0.03	100
% Area Pop =	0.16	0.05	0.01	0.04	100
% Area Labor =	0.15	0.05	0.01	0.04	100
Town Pop =	6485	2267	376	1606	41594
Work Force =	2943	984	179	748	19058
# Women Work =	1186	383	77	331	7938
% Women In LF =	0.40	0.39	0.43	0.44	0.42

Source: U.S. Census
Sandwich Research Group
Maine Dept. of Human Services
So. Kennebec Planning & Development Council

TABLE 7

Randolph Trading Area

TRAVEL TIME TO WORK	RANDOLPH N=	%	Augusta N=	%	Chelsea N=	%	Dresden N=	%	Farmingdale N=	%	Gardiner N=	%	Pittston N=	%	Somerville N=	%	Whitefield N=	%	TOTAL
Less than 10 min	164	0.22	3010	0.31	122	0.15	17	0.05	150	0.13	560	0.21	36	0.04	4	0.05	61	0.12	4107
10 to 19 min.	344	0.45	4434	0.46	417	0.50	94	0.26	542	0.48	876	0.33	246	0.30	11	0.13	91	0.18	6961
20 to 29 min.	149	0.20	1207	0.13	177	0.21	86	0.24	244	0.22	653	0.24	268	0.33	8	0.09	142	0.28	2848
30 to 59 min.	89	0.12	753	0.08	83	0.10	135	0.38	153	0.14	456	0.17	224	0.27	60	0.69	177	0.35	1995
Over 1 hour	16	0.02	225	0.02	31	0.04	26	0.07	40	0.04	126	0.05	47	0.06	4	0.05	35	0.07	524
TOTALS	762		9629		830		358		1129		2671		821		87		506		16793

TRAVEL MEANS TO WORK	RANDOLPH N=	%	Augusta N=	%	Chelsea N=	%	Dresden N=	%	Farmingdale N=	%	Gardiner N=	%	Pittston N=	%	Somerville N=	%	Whitefield N=	%	TOTAL
Drive alone	496	0.65	6109	0.64	534	0.62	188	0.50	738	0.66	1519	0.58	541	0.61	60	0.47	304	0.55	10302
Carpool	203	0.27	2102	0.22	249	0.29	163	0.43	293	0.26	807	0.31	269	0.30	41	0.32	192	0.35	4156
Public transpo	4	0.01	41	0.00	10	0.01	3	0.01	15	0.01	33	0.01	6	0.01	0	0.00	2	0.00	111
Walk only	29	0.04	982	0.10	24	0.03	2	0.01	36	0.03	216	0.08	15	0.02	0	0.00	17	0.03	1319
Other means	11	0.01	135	0.01	3	0.00	4	0.01	14	0.01	17	0.01	14	0.02	2	0.02	10	0.02	206
Work at home	16	0.02	197	0.02	42	0.05	15	0.04	30	0.03	21	0.01	37	0.04	24	0.19	30	0.05	397
TOTALS	759		9566		862		375		1126		2613		882		127		555		16490

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COMMUTING PATTERNS

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TABLE 8 Randolph Trading Area

PROFESSIONAL DISTRIBUTION 198Ø

	RANDOLPH		Augusta		Chelsea		Dresden		Farmingdale	
	N=	% Area	N=	% Area	N=	% Area	N=	% Area	N=	% Area
Professional, Technical, Kindred & Managers	136	0.04	2259	0.58	123	0.03	107	0.03	300	0.08
Sales & Clerical	205	0.04	3485	0.64	256	0.05	53	0.01	400	0.07
Service Workers	164	0.06	1471	0.52	172	0.06	83	0.03	139	0.05
Crafts/Precision Workers	115	0.05	1106	0.52	115	0.05	64	0.03	137	0.06
Operatives/Laborers	159	0.06	1413	0.50	212	0.07	76	0.03	171	0.06
TOTAL	779	0.05	9734	0.57	878	0.05	383	0.02	1147	0.07

	Gardiner		Pittston		Somerville		Whitefield		TOTAL
	N=	% Area	N=	% Area	N=	% Area	N=	% Area	N=
Professional, Technical, Kindred & Managers	592	0.15	144	0.04	27	0.01	178	0.05	3866
Sales & Clerical	721	0.13	232	0.04	21	0.00	140	0.03	5513
Service Workers	475	0.17	187	0.07	34	0.01	107	0.04	2832
Crafts/Precision Workers	348	0.16	143	0.07	18	0.01	69	0.03	2115
Operatives/Laborers	501	0.18	190	0.07	29	0.01	76	0.03	2827
TOTAL	2637	0.15	896	0.05	129	0.01	570	0.03	17153

BUSINESS/ INDUSTRY TRENDS
Augusta LMA

Employment

TABLE 9 **Randolph Trading Area**

	1980		1982		1984		INCREASE
	N=		N=		N=		'80-84
Total Employment	30950		29190		31390		0.01
Manufacturing	4890	0.16	4370	0.15	4590	0.15	-0.06
Durables	1170	0.04	1210	0.04	1220	0.04	0.04
Nondurables	3720	0.12	3160	0.11	3370	0.11	-0.09
Nonmanufacturing	26060	0.84	24820	0.85	26800	0.85	0.03
Construction	1250	0.04	1170	0.04	1210	0.04	-0.03
Trans/util/comm	1640	0.05	1600	0.05	1680	0.05	0.02
Trade	5310	0.17	5260	0.18	5710	0.18	0.08
Finance/ins/rl est.	920	0.03	890	0.03	940	0.03	0.02
Services/other	4640	0.15	4280	0.15	4810	0.15	0.04
Government	12300	0.40	11620	0.40	12460	0.40	

Source:
Maine Bureau of Employment Security
Sandwich Research Group

*Covered employment only

Sandwich Research Group Inc.

REAL ESTATE VALUE

TABLE 10 Randolph Trading Area

	Full Value ($000)	% Of Area	State Assessm. ($000)	# Parcels	% Area
RANDOLPH	15751	0.003	20350	637	0.04
Augusta	4384174	0.95	427850	7368	0.46
Chelsea	23649	0.01	22400	936	0.06
Farmingdale	38216	0.01	43600	1060	0.07
Dresden	20455	0.004	19700	760	0.05
Gardiner	92282	0.02	90050	2470	0.15
Pittston	28285	0.01	29600	1050	0.07
Somerville	5999	0.001	7000	380	0.02
Whitefield	19513	0.004	27050	1289	0.08
T O T A L	4628324		687600	15950	

RESIDENT EXPENDITURES

Trading Area

TABLE 11 Randolph Trading Area

AVERAGE OUTLAY

	Per Family $$	% Of Outlay	Per Month	TOTAL AREA	4887
Shelter	7219	0.28	602	35280000	
Food	3867	0.15	322	18900000	
Eat out	1031	0.04	86	5040000	
Transpo	2063	0.08	172	10080000	
Clothes	1289	0.05	107	6300000	
Personal	516	0.02	43	2520000	
Ins/Job	1289	0.05	107	6300000	
Medical	1031	0.04	86	5040000	
Recrea/ed	1289	0.05	107	6300000	
SS,Disab	1805	0.07	150	8820000	
Taxes	3610	0.14	301	17640000	
Saving/In	773	0.03	64	3780000	
TOTAL	25783	1		$ 126 M	
$$ Per Diem	61			Per Year	

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TABLE 12 Randolph Trading Area

	AVERAGE OUTLAY			
	Per Family $$	% Of Outlay	Per Month	TOTAL RANDOLPH
Shelter	6762	0.28	564	3726016
Food	3623	0.15	302	1996080
Eat out	966	0.04	81	532288
Transpo	1932	0.08	161	1064576
Clothes	1208	0.05	101	665360
Personal	483	0.02	40	266144
Ins/Job	1208	0.05	101	665360
Medical	966	0.04	81	532288
Recrea/ed	1208	0.05	101	665360
SS,Disab	1691	0.07	141	931504
Taxes	3381	0.14	282	1863008
Saving/In	725	0.03	60	399216
TOTAL	24151	1		13307201
$$ Per Diem	57			Per Year

TABLE 13

Randolph Trading Area

RETAIL SALES

	1976	1980	1982	1983	1984	1985
RANDOLPH	1224	1592	1830	1520	1680	1930
% All Sales	0.05	0.06	0.06	0.04	0.04	0.04
Chelsea	117	286	399	740	890	1040
% All Sales	.004	0.01	0.01	0.02	0.02	0.02
Farmingdale	1151	1550	1870	2240	2560	2710
%	0.05	0.05	0.06	0.06	0.06	0.06
Gardiner	15033	16550	19120	21600	23740	26180
%	0.62	0.57	0.59	0.59	0.58	0.57
Hallowell	5918	8330	7940	8980	10610	11570
%	0.25	0.29	0.25	0.25	0.26	0.25
Pittston	339	126	570	674	1014	1328
%	0.01	.004	0.02	0.02	0.02	0.03
Whitefield	346	441	557	624	779	893
%	0.01	0.02	0.02	0.02	0.02	0.02
TOTAL	24128	28875	32286	36378	41273	45651
Augusta $$$	112438	149613	182880	217207	240427	266143
As % Marketplace	0.82	0.84	0.85	0.86	0.85	0.85

Source: Maine Bureau of Taxation
Sandwich Research Group Information Service

% Area

Sandwich Research Group Inc.

TABLE 14

Randolph Trading Area

RETAIL SALES

	1976	1980	1982	1983	1984	1985
RANDOLPH	1224	1592	1830	1520	1680	1930
% Change	--	0.30	0.15	-0.17	0.11	0.15
Chelsea	117	286	399	740	890	1040
% Change	--	1.44	0.40	0.85	0.20	0.17
Farmingdale	1151	1550	1870	2240	2560	2710
% Change	--	0.35	0.21	0.20	0.14	0.06
Gardiner	15033	16550	19120	21600	23740	26180
% Change	--	0.10	0.16	0.13	0.10	0.10
Hallowell	5918	8330	7940	8980	10610	11570
% Change	--	0.41	-0.05	0.13	0.18	0.09
Pittston	339	126	570	674	1014	1328
% Change	--	-0.63	3.52	0.18	0.50	0.31
Whitefield	346	441	557	624	779	893
% Change	--	0.27	0.26	0.12	0.25	0.15
TOTAL	24128	28875	32286	36378	41273	45651
% Change	--	0.20	0.12	0.13	0.13	0.11
Augusta $$$	112438	149613	182880	217207	240427	266143
% Change	--	0.33	0.22	0.19	0.11	0.11

% GROWTH

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TABLE 15

Maine

RETAIL SALES

% GROWTH

	1980	1982	1984
MAINE	3170462	3784966	5090122
% Change	--	0.19	0.34
Bldg. Supply	427220	478402	700566
% Change	--	0.12	0.46
Food Stores	330190	387311	489564
% Change	--	0.17	0.26
Gen Merchandise	765237	894466	1163854
% Change	--	0.17	0.30
Misc Retail	407639	480215	608912
% Change	--	0.18	0.27
Auto Sales	762520	970559	1389732
% Change	--	0.27	0.43
Food & Lodging	477656	574013	737494
% Change	--	0.20	0.28

Source: Maine Taxable Sales Annual Report, 1984
Maine Department of Taxation
Sandwich Research Group Information Service

TABLE 16

Augusta Area

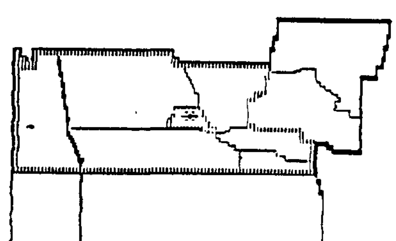
RETAIL SALES

% GROWTH

	1980	1982	1984
AUGUSTA AREA	170488	211181	276600
% Change	--	0.24	0.31
Bldg. Supply	18666	22215	30790
% Change	--	0.19	0.39
Food Stores	20424	28840	33029
% Change	--	0.41	0.15
Genl Merchandise	44157	50501	70162
% Change	--	0.14	0.39
Misc Retail	17946	21159	24838
% Change	--	0.18	0.17
Auto Sales	48700	64146	86840
% Change	--	0.32	0.35
Rest. & Lodging	20595	24320	30941
% Change	--	0.18	0.27

Source: Maine Taxable Sales Annual Report, 1984
Maine Department of Taxation
Sandwich Research Group Information Service

Overview



GENERAL CHARACTERISTICS OF RANDOLPH & ITS POPULATION

- *Randolph is a community of generally moderate income families located just southeast of the Maine capital of Augusta.*

- *Randolph is extremely well-situated along a well-traveled transportation artery.*

- *Its trading area is made up of eight communities within a 10-mile radius, with a population of 40,000 people clustered around the state capital.*

- *Regional population expansion during the 1970s was at a rate below that of the state as a whole. While the state population grew by 13 percent in that time, the Randolph trading region expanded by 5 percent in the previous decade.*

- *Growth has been negligible in the 1980s except in the southeastern area of which Randolph is a part.*

- *After experiencing a modest growth rate in the early 1970s, Randolph's population of nearly 1,900 appears to be expanding at a slightly more rapid pace, due chiefly to natural gains through births. Smaller towns surrounding Randolph have been experiencing significant in-migration.*

- *By age and education, Randolph's population in the last census was not unlike residents in towns elsewhere in the region. Although some other communities had higher proportions of college graduates, Randolph had a low proportion of residents who had not graduated from high school.*

- *Randolph residents fall at the middle of the income spectrum for the trading area.*

- *Randolph is a bedroom community with a well-established commuter population. Deterioration of housing stock has led to a concerted housing rehabilitation effort.*

- *Housing growth has been slow in the 1980s.*

:: :: :: ::

GENERAL CHARACTERISTICS
OF RANDOLPH & ITS POPULATION

1. INTRODUCTION

Randolph is a community of generally moderate income families located southeast of the Maine capital of Augusta. By population, its 1,900 residents are an average number for exurban towns in the trading area. By geographic size, however, it is the smallest town in the state, and thus more densely populated than its neighbors.

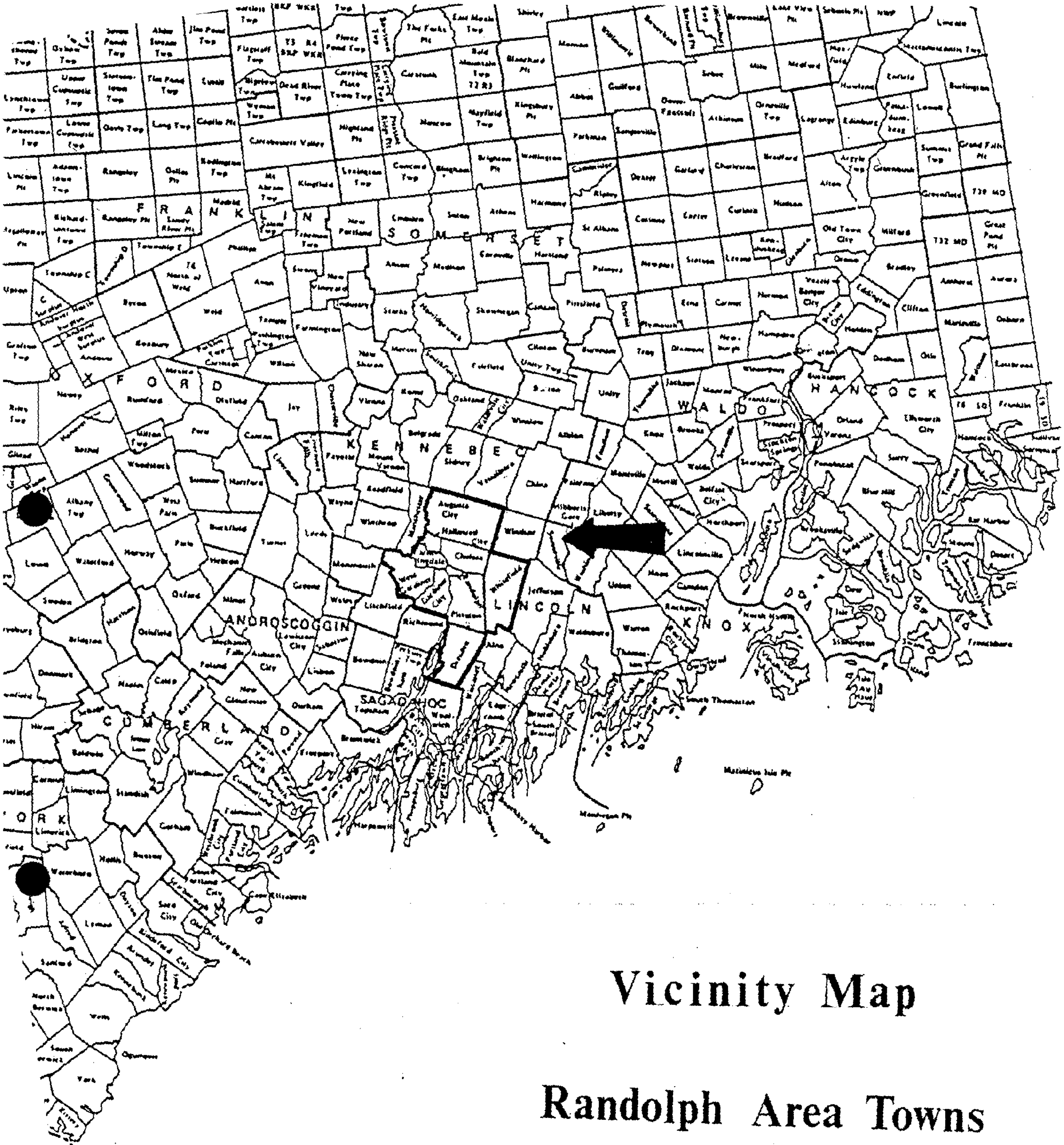
2. GEOGRAPHY

Randolph is located six miles southeast of Augusta. (Figure 2) The region is known as the Southern Kennebec Region after the river which courses north-south between Randolph and Gardiner. (Figure 3)

2.1 Commercial Center

The focus of this study -- the Randolph business district -- occupies the western sector of town, along the river. It extends less than a mile along Routes 9 and 27, or Water Street, from the Pittston border on the south to the Chelsea border on the north. (Figure 5)

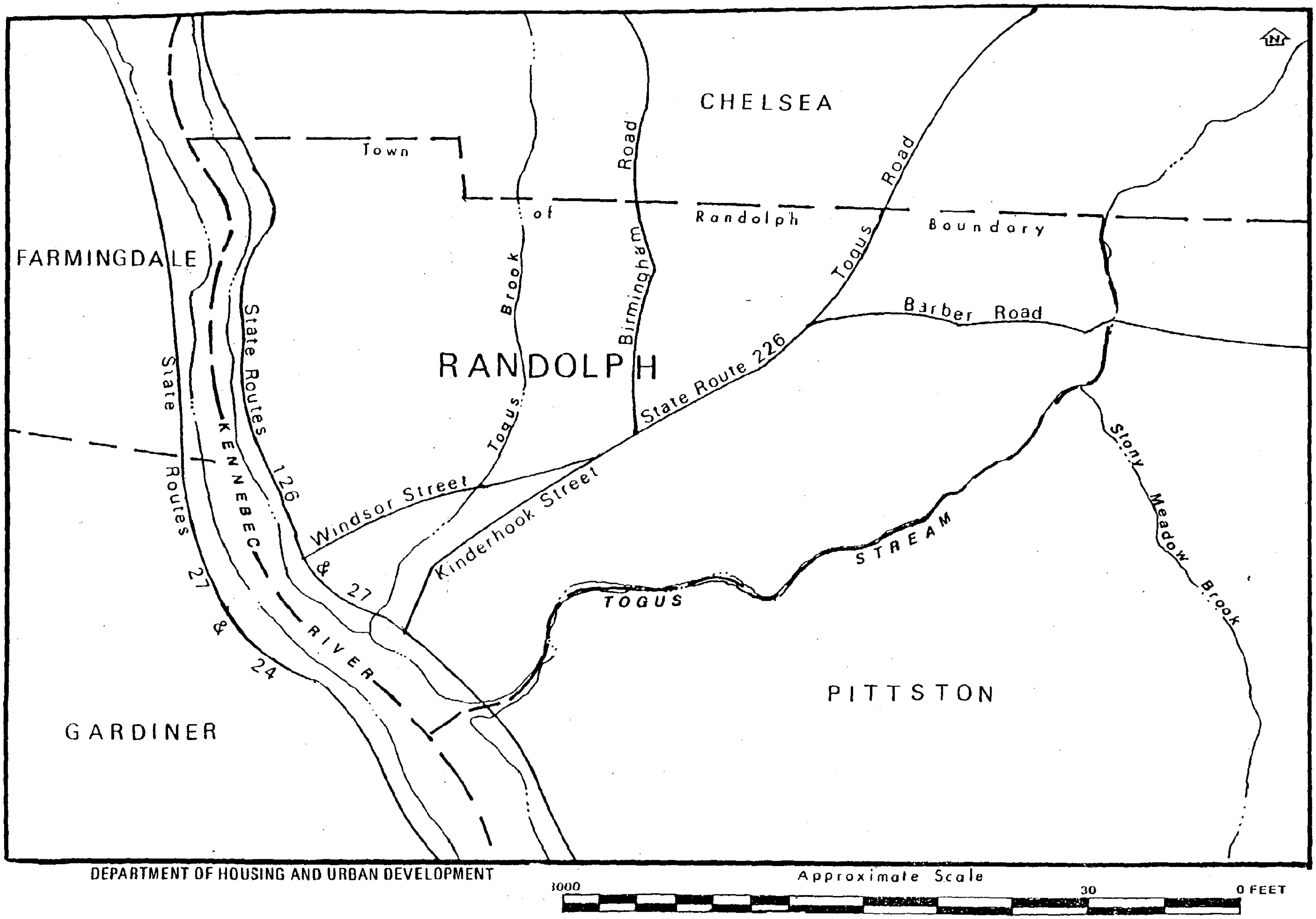
The region is located just west of both Interstate 95 and the Maine Turnpike (Figure 4), around an hour north of Portland. The Town of Randolph is extremely well-situated at the nexus of several well-traveled state transportation arteries. The study area is traversed daily by thousands of commuters who are potential business patrons or users of recreational sites.



Vicinity Map

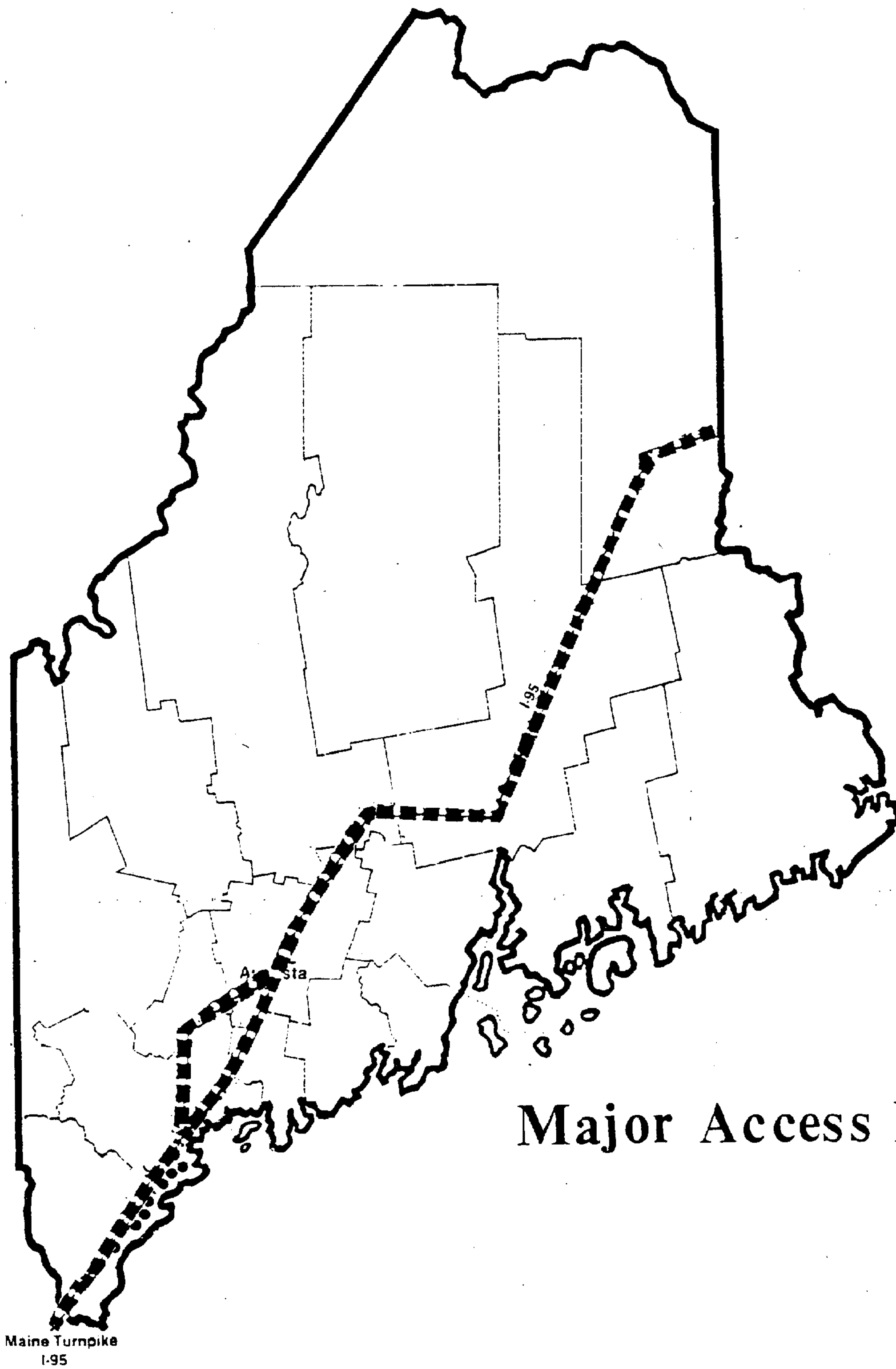
Randolph Area Towns

FIGURE 2



DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

FIGURE 3



Major Access Routes

FIGURE 4

The town's concentration of commerce -- greatly diminished over the years -- is just south of the intersection of the new bridge between Gardiner and Randolph and Route 9. A secondary district -- enhanced by heavily-traveled commuter traffic up Windsor Street -- is lightly populated by businesses. (Figure 6)

2.2 Trading Area

The general trading area in which Randolph lies has been defined as a region anchored by Augusta and including

- *Randolph*
- *Augusta*
- *Chelsea*
- *Hallowell*
- *Farmingdale*
- *Gardiner*
- *Pittston, and*
- *Whitefield*

These towns are schematically represented on the map below. They make up a population of 40,000 people, half of them in Augusta. For the purposes of this study, however, the seven towns around the state capital are frequently assessed without Augusta. Randolph's primary trading area, reviewed at some length later, stretches only one-fifth of a mile in any direction. Its secondary area includes the towns above.

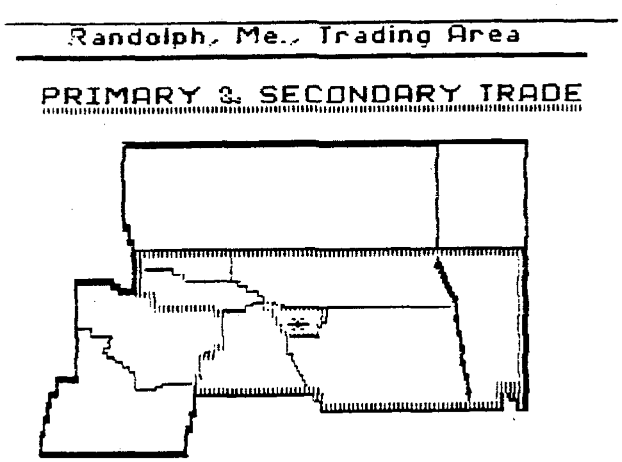


FIGURE 5

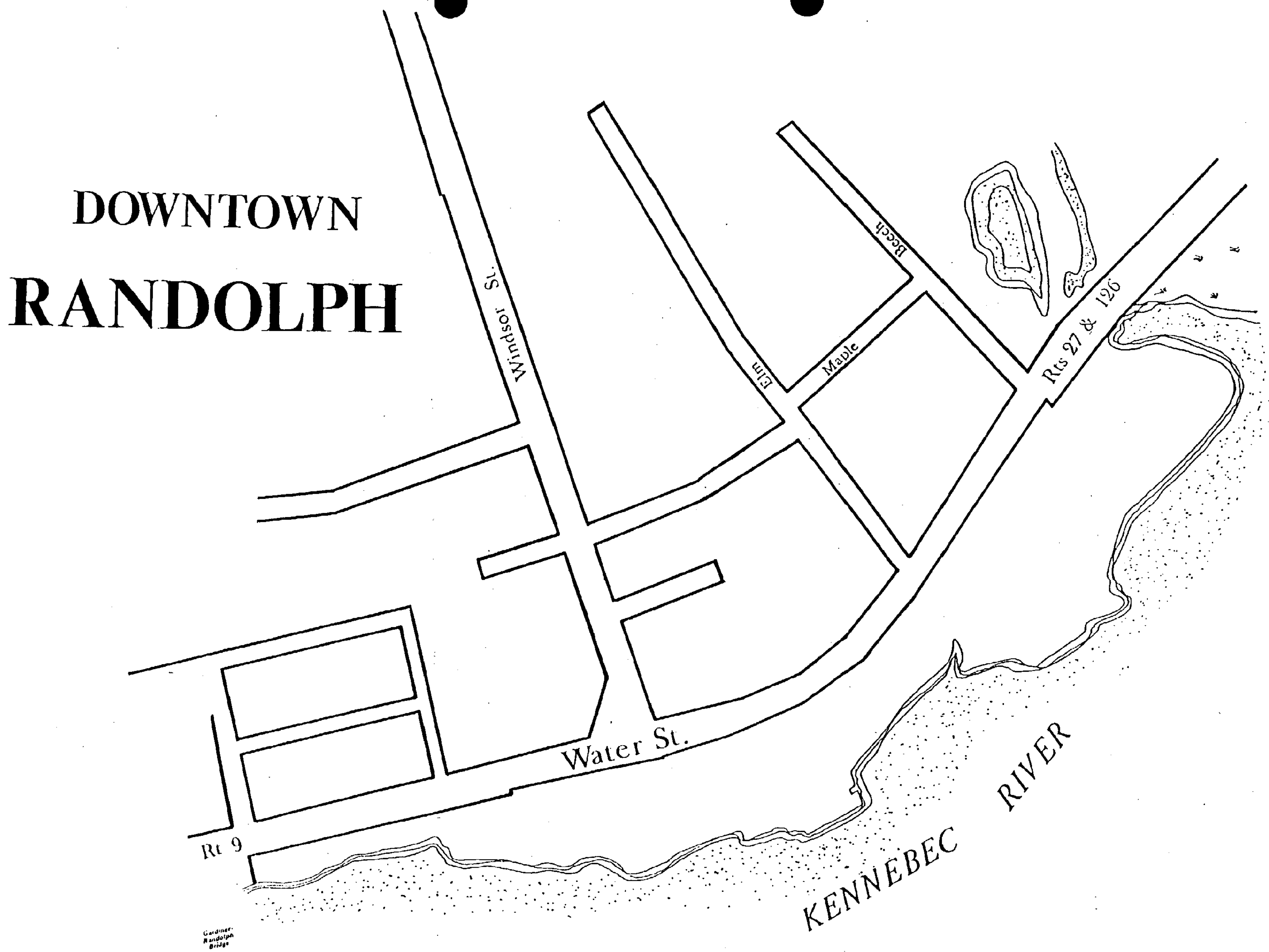

DOWNTOWN
RANDOLPH
Windsor St.
Elm
Maple
Beech
Rts 27 & 126
Water St.
Rt 9
Gardiner-Randolph Bridge
KENNEBEC RIVER

FIGURE 6

3. POPULATION

Randolph is one of the mid-sized communities in the trading area, and its population growth represents modest expansion since 1970.

The region falls into three tiers when population is assessed. Augusta, the state's sixth-largest city, is a major commercial center, claiming nearly half the study population. Next-largest municipality is Gardiner, across the river from Randolph, with around 6,800 people. Five communities of around 2,000 residents each lie on its periphery. (Table 1)

Randolph, Me., Trading Area

GROWTH, LAST DECADE

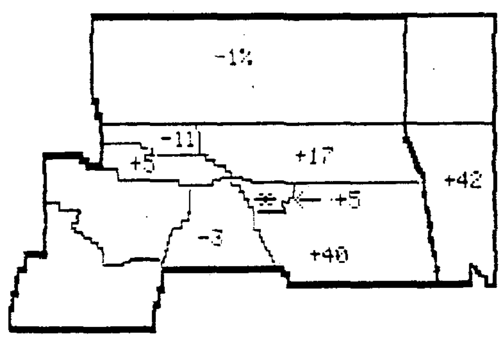


FIGURE 7

This region expanded in population at a rate below that of the state as a whole during the 1970s, and continues to do so. While the state population grew by 13 percent between 1970 and 1980, the Randolph trading region expanded by 5 percent in the previous decade and has registered almost no net population growth in the 1980s.

The most energetic expansion among these towns occurred on the east side of the river, in the outlying towns of Whitefield and Pittston, which border Randolph. On the west side of the river, Augusta and nearby Hallowell and Gardiner lost population during the 1970s. (Table 2) Augusta and Hallowell continued to do so during the early years of this decade. (Table 1)

Randolph, Me., Trading Area

GROWTH, THIS DECADE

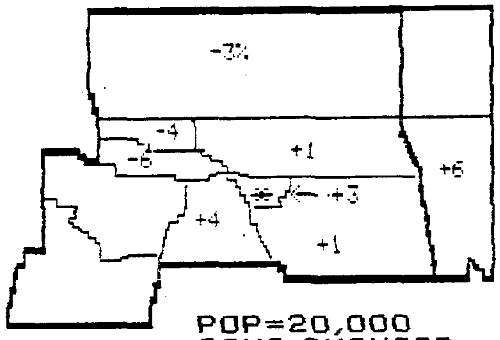


FIGURE 8

Absolute population growth in the region in the 1970s was under 2,000; net loss of population of around 200 has occurred since 1980.

Randolph's population in 1970 was 1,741. The number of residents grew to 1,834 in 1980 and has grown by 50 persons since then, due to a natural gain of more births than deaths in the town. (Table 1)

3.1 In-Migration

In-migration can be measured in several ways. (Tables 1 and 2) Net migration is determined by subtracting net natural gain (births and deaths) from the total new population. In the Randolph trading area between 1970 and 1984, births outnumbered deaths by nearly 2,500 while population expanded by 1,565 -- a net out-migration of more than 1,100 people, most of it from Augusta.

In Randolph, the population gains measured are in large part due to births, rather than to large-scale in-migration. (Tables 1 & 2)

4. OTHER CHARACTERISTICS

General demographic characteristics affect the consumer marketplace which is the focus of this study.

These characteristics translate into consumer and investment norms which apply to different stages of life. A large pre-middle age segment, for example, is in the prime home-buying stage, cannot be expected to save much of its income and can be expected to be prime installment loan customers for purchases of durable goods.

The aging of our population has predictable consequences for the economy: the consumer habits and investment practices of the so-called "empty-nest" group demand different products and marketing approaches.

4.1 Age

Randolph (31.3 years) and many of the surrounding towns have median ages which are slightly older than the state as a whole (30.4 years). This apparently represents a larger middle-aged population as opposed to elderly, since most towns in the area have proportions of senior citizens below the state average of 12.5 percent. (Table 4)

4.2 Education

Education and income are generally positively related, a factor which is reflected in the regional data. Randolph is a comparatively well-educated community, although not a town of college graduates. Rather, the town has a very small proportion of people who failed to graduate from high school. (Table 5)

4.3 Income

Communities in the Randolph trading area registered 1979 average family incomes of nearly $18,700, compared to the state average of $18,254. Of eight trading area communities examined, Randolph's average family income was just below the regional norm, or $17,065.

Randolph ranks near the regional norm in income levels among area towns. A relatively high level of incomes for non-working families affects this status; when those families are eliminated from the scale, income levels generally fall in the middle of the regional range. (Table 6)

A $13,987 median annual household income figure for Randolph means, of course, that half of the 657 households' incomes fell below that level yearly. (Maine's median household income was $13,816. A houshold includes units with one person or with non-related inhabitants.)

Of those with incomes below the median, 212 households (32 percent) in Randolph earned under $10,000 in 1979; another 32 percent clustered in the $10,000-to-$14,000 area. Only 3 percent fell into the then relatively affluent category of incomes of $35,000 or more, compared to 6 percent of the state.

Further discussion of income and aggregate regional spending power occurs in later chapters.

4.4 Housing Trends

Housing unit expansion was strong in the 1970's in the region, and was related to population expansion, as the following table shows. Again, the greatest activity occurred in towns from which, as it will be shown, Randolph's commerce draws roughly half of its patronage.

Exhibit 1

HOUSING EXPANSION

	% Housing Up	# Units	% Pop. Up	# New 80-84
RANDOLPH	20	691	5	4
Augusta	24	8990	1	NA
Chelsea	74	719	17	29
Gardiner	10	2512	-3	38
Farmingdale	22	960	5	99
Hallowell	23	1123	-11	6
Pittston	53	741	42	11
Whitefield	36	550	40	NA

Randolph is a bedroom community with a well-established commuter population. Deterioration of housing stock has led to a concerted housing rehabilitation effort, using Federal grant monies and matching funds and loans.

5. CONCLUSION

The population which the Randolph downtown commercial district services is a largely middle-market one, in a region experiencing growth chiefly in the geographic segment in which Randolph lies.

The following chapter defines the marketplace and its economy in greater detail, addressing commercial trends and the role which household spending plays in it.

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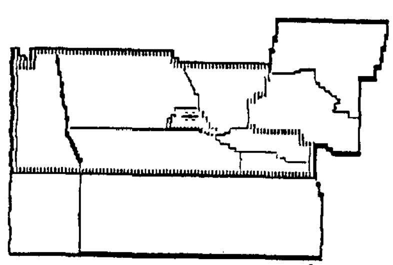
Defining The Market



DEFINING THE MARKET

- Randolph is a town with little industry and a small commercial base. Local commerce caters mostly on a convenience basis to permanent residents and commuters.

- The extent to which Randolph is a bedroom community is reflected by the fact that only 22 percent of workers have jobs within 10 minutes of travel time from home.

- Government and trade dominate the trading area economy, with a decreasing role by manufacturing. Jobs in wholesale and retail trade expanded most rapidly between 1980 and 1984.

- Although Maine is a state with an important tourist economy, the Augusta area plays only a moderate role compared to other regions of the state.

- Randolph's aggregate income among families was between \$12.4 and \$13.3 million in 1985, up from \$8.8 million in 1979. Most of this income, most of it "fresh" dollars earned outside of town, is not spent in Randolph to help the economy grow.

- Based on aggregate town income, Randolph residents spend around \$4 million yearly on housing and \$2 million on groceries.

- The primary trading area boundary of Randolph is only one-fifth of a mile from the center of town.

- In 1985, there were \$45 million in taxable retail sales in the local-town trading area. Gross aggregate family income was put at \$126 million.

- Randolph sustained a 6 percent retail market share in its trading area through the early 1980s, but it has lost share to surrounding smaller towns, as has Gardiner.

- Randolph's downtown will service its own population as a "neighborhood shopping center," and its commuters as a convenience location. It may, in time, generate some destination traffic via the riverfront and via retail mix.

DEFINING THE MARKET:

COMMERCE & THE ECONOMY IN THE REGION

1. INTRODUCTION

Randolph's economy, like any economy, is evolutionary. This evolution is tied to other economies and events beyond town borders and should be examined in this light. The demise of the the ice industry, for example, had a dramatic effect on towns such as Randolph. The advent of the highway and its creation, the commuter, plied its influence, too.

The Research Group examined the regional economy as an appropriate mirror of the broader market characteristics which apply to the Randolph marketplace. The benchmarks used were:

- *Industry mix,*
- *Profile of the commercial -- especially retail-- marketplace, and*
- *The financial characteristics of the local population.*

From these characteristics, the most reasonable planning strategy for Randolph appeared to be development of a consolidated and upgraded retail marketplace downtown, incorporating the riverfront's recreational draw.

2. INDUSTRY

Randolph is a town with little industry other than its retail-commercial base catering on a mostly-convenience basis to permanent residents and commuters. An apparel manufacturing operation has been in town for years and employs 20 people. The Hodgkins foundry employing several dozen people closed in 1985.

This means that employment is relatively centralized in the area, and that commuting by car is the rule, not the exception.

The extent to which Randolph is a bedroom community is reflected by 1980 commuting information which shows that only one in five residents worked within 10 minutes' travel time from home.

Around half of short-distance commuters are employed in Randolph, meaning that the town's businesses provide around 10 percent of employment in the Randolph work force. (Table 7)

The corollary to this commuting is the requirement for transportation to work, a factor which limits, to some degree, employment for and employability of indigenous workers without cars.

But the Randolph worker is not alone. Commuter traffic courses through Randolph daily; its volume has almost certainly increased with migration to the towns east of Randolph, several of which are reached by driving through Randolph.

2.1 Jobs: Who Pays Whom

Government dominates the trading area economy, employing 40 percent of the workers in the Augusta labor market area. Overall, employment increased only 1 per cent in the area, with losses in manufacturing and the greatest gains in retail and wholesale trade. (Table 9)

3. THE RETAIL MARKET

It is this trade -- and consumer services -- that will drive Randolph's commercial resurgence.

Available space, the river, competition from Gardiner and Augusta -- all these suggest that Randolph must focus on convenience (its location) and perhaps some specialty trade (river related, perhaps) in its planning.

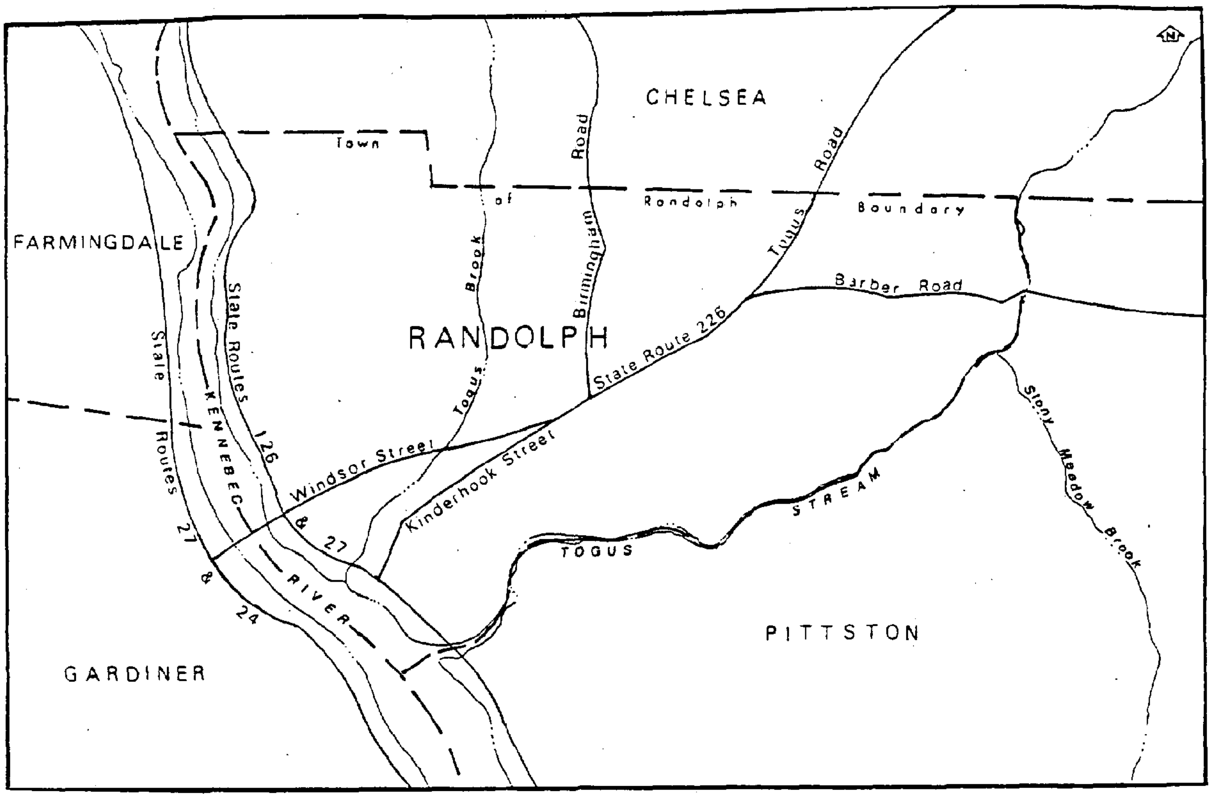


FIGURE 1

There is ample evidence that the town would support household convenience and dining enterprise. Retail expansion in similar-sized towns surrounding Randolph suggest that the time to provide services to these expanding towns and their commuters is now.

3.1 Trading Areas

Using Reilly's law of retail gravitation, which establishes a relationship between populations and distance in competing retail areas, one finds that the primary trading area boundary of Randolph is only one-fifth of a mile from Gardiner.

But it is important to note that this is applicable to shopper goods, not to convenience goods or, often, specialty goods.

As noted in the previous chapter, at least six other towns -- plus Augusta -- have been designated as the secondary trading area for Randolph, based chiefly on commuting patterns.

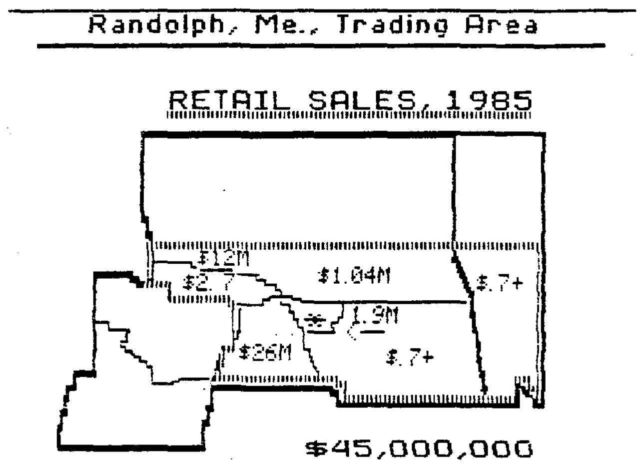


FIGURE 2

3.2 Sales Trends

In 1985, there were $45 million in taxable retail sales in the seven-town trading area which included Randolph but excluded, for balance reasons, Augusta. (Food items are not taxed.)

On a per capita basis, this means that Randolph ranks in the middle, with taxable retail sales of $1,024 for each resident -- considerably higher than likely per capita expenditures for these residents on similar items. (Estimated non-food outlays in Randolph are discussed later. See Table 12)

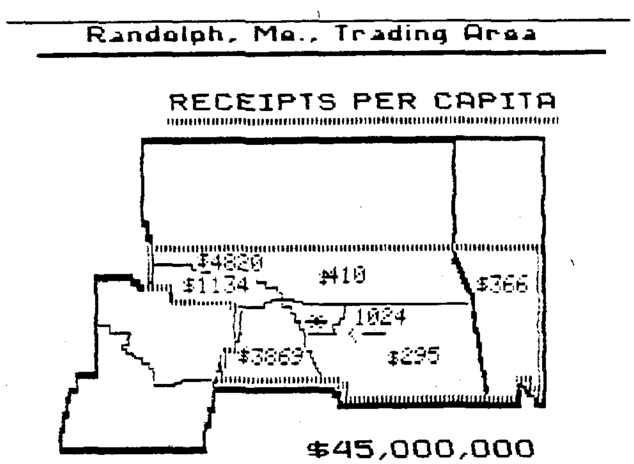


FIGURE 3

But where Randolph sustained a 6 percent retail market share in its trading area through the early 1980s, it has lost share to surrounding smaller towns, even as Gardiner has lost share. (Table 13)

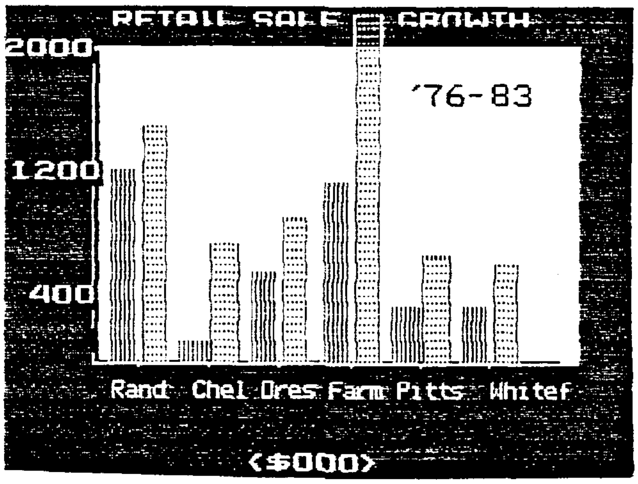


FIGURE 4

<u>In this arena, Randolph has lost momentum.</u> While it enjoyed a rate of retail growth 50 percent higher than the region generally in the late 1970s (Table 14), it has been slightly below the trading area averages in the 1980s -- except in 1985

Overall taxable sales in the trading area have increased from $24 million in 1976 to $45.6 million in 1985, with Chelsea and Pittston generating the most impressive increases in market share.

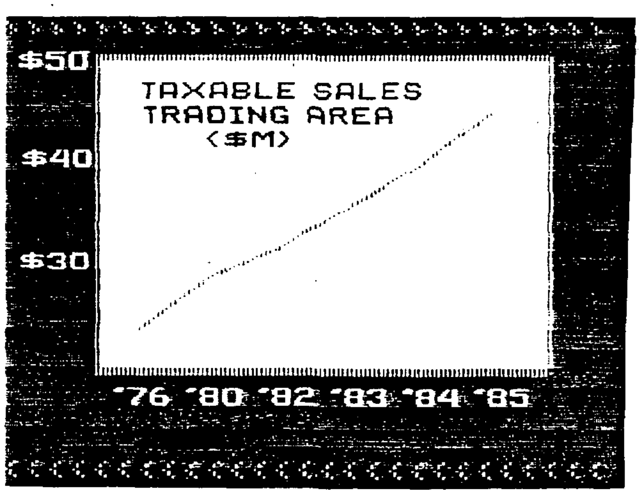


FIGURE 5

FIGURE 6

3.3 Competition

Randolph's downtown will service its own population as a "neighborhood shopping center," and its commuters as a convenience location. It may, in time, generate some destination traffic via the riverfront and retail mix.

Other research reviewed in ensuing chapters suggests little consumer demand for the shoppers goods -- weekly family household needs -- or comparison goods, the goods one travels to in order to gain a price benefit. What Randolph will continue to sell is time -- offering the immediacy or the lesser distance to travel.

In other words, the town is not in competition with Gardiner and Augusta. The share-of-market for Randolph's trade is growing in community's similar to Randolph.

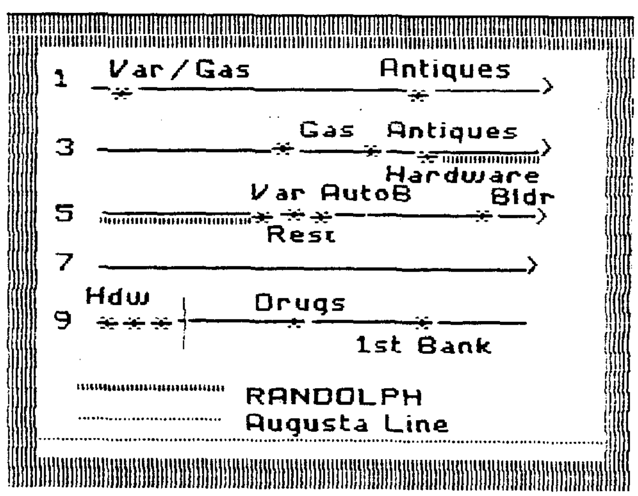


FIGURE 7

If Randolph's non-local trade area is actually the ribbon of highway outside its door, with little competition from ancillary roads (drivers won't turn), then it is really the only neighborhood center in a 10-mile drive line undertaken by researchers. Presented schematically on the previous page, the route is represented in two-mile segments beginning in Pittston (1 ff.) and ending north of the Augusta line.

==

Enhancing the current commercial environment and making a few complementary additions to the downtown mix should increase both local residents' outlays and those of the non-Randolph residents who, as the research found, are often in town.

==

As the final chapter of this report suggests, the market will support judicious expansion in Randolph.

4. B U Y I N G   P O W E R

Retail market analysis often addresses effective sales capacity, an effort to determine room for growth in a sales area. This is done by gauging the differences between personal consumption and buyer opportunity.

Total pre-tax personal income in the trading area -- less Augusta -- was put at $126 million, for example, of which about $13 million was generated in Randolph.

Measures of disposable income can be made by deducting tax burdens from incomes. Further breakdowns -- such as disposable income after housing costs -- can be developed; so, for example, can the average level of carrying costs for shelter per family.

Around half of this sum is allocated to inelastic -- essentially compulsory -- demand for goods and services: housing (higher among renters) and food, leaving the rest to be spent on other goods and services, such as household needs, recreation and transportation.

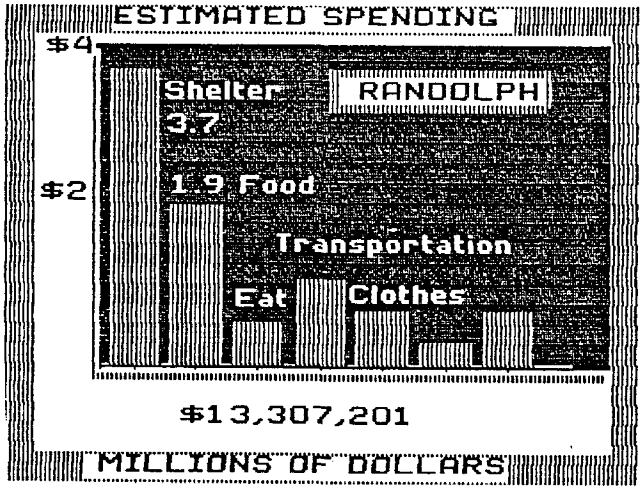


FIGURE 8

Typically, family outlays for nondurable and personal goods approach 33 percent after taxes, with services accounting for another one-third or more.

Based on soft goods sales per square foot of $100, and on the unlikely assumption that all Randolph dollars remained in town, non-food and non-dining sales among Randolph citizens alone would support 32,500 square feet of non-food retail space.

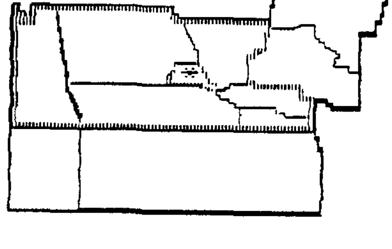
Based on median supermarket sales in the nation, their household food demand would require more than 7,300 square feet.

Based on the average number of meals eaten out for most families, and assuming fast food or carryout were preferred (they earn more per square foot than conventional restaurants), the townspeople could support 3,500 square feet of these food centers -- assuming they ate nowhere else.

Even a small share of this demand does not amount to the supply currently in Randolph's commercial inventory. The next chapter reviews that supply, and, after that, looks at the regional consumer.

::: ::: :::

Downtown Randolph



PROFILE OF THE DOWNTOWN:

STRUCTURE OF A COMMERCIAL BASE

- Randolph is a town of small, mostly family-owned and operated, businesses concentrated in an architecturally various commercial artery along a brief span of Water Street, a major commuter route.

- Randolph's is a year-round economy servicing both local and regional retail trade. There is some seasonality linked to summer tourist traffic and the Kennebec River.

- Twenty -- mostly household service, convenience retail, construction-related and automobile service -- cater to consumers, who tend to buy weekly household and larger-scale shoppers goods elsewhere. Five other commercial sites are no longer occupied.

- Retail trade in Randolph has grown steadily in the past 10 years, but has lately been outpaced by faster growth rates in smaller neighboring communities.

- Regional residents -- many of them commuters -- are estimated to make up 40 percent or more of the year-round downtown customer base in Randolph.

- In 1986, major employers in town reported 51 full-time workers in the private sector -- two-thirds downtown -- and 13 permanent part-time workers, mostly downtown. Remaining businesses are largely sole-proprietorships with few, if any, employees.

- Traffic volume on Water Street peaks at 10,000 vehicles daily.

- Infrastructure needs upgrading -- sewer and water problems remain. Pedestrian amenities are quite inadequate.

- Parking is adequate for current use. Expansion should be on the eastern side of Water Street. No potential for on-street parking exists.

- No major capital improvements are planned in currently occupied businesses, although several currently vacant structures have new owners with business plans for them.

- Despite flood plain constraints on growth, the existing business district should remain on Water Street.

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PROFILE OF THE DOWNTOWN: STRUCTURE OF A COMMERCIAL BASE

1. INTRODUCTION

Randolph is a town of small, usually family-owned and operated, businesses concentrated in an architecturally disunified commercial artery along a 1,000-foot span of Water Street.

The commercial center is located on a major north-south commuter highway (Routes 27 and 9) which follows the Kennebec River out of the state capital of Augusta. About 20 household service, convenience retail, construction-related and automobile service businesses cater to local and commuting consumers -- who tend to buy weekly household and larger-scale shoppers goods elsewhere.

Business volume in Randolph is not linked dramatically to season, although some fluctuation due to activity on the river does occur.

:: :: :: ::

The area under study for the Randolph downtown economic feasibility study lies along less than one mile of Water Street, along the western border of town (Figure 1) The central business district spans Water Street from Windsor Street south to Beech, with several operating and a few closed businesses found within another half-mile of the central business district.

Randolph is extremely well-situated along two major transportation arteries. Its commercial center is just south of the convergence of Routes 27 and 9, at the new Randolph-Gardiner Bridge.

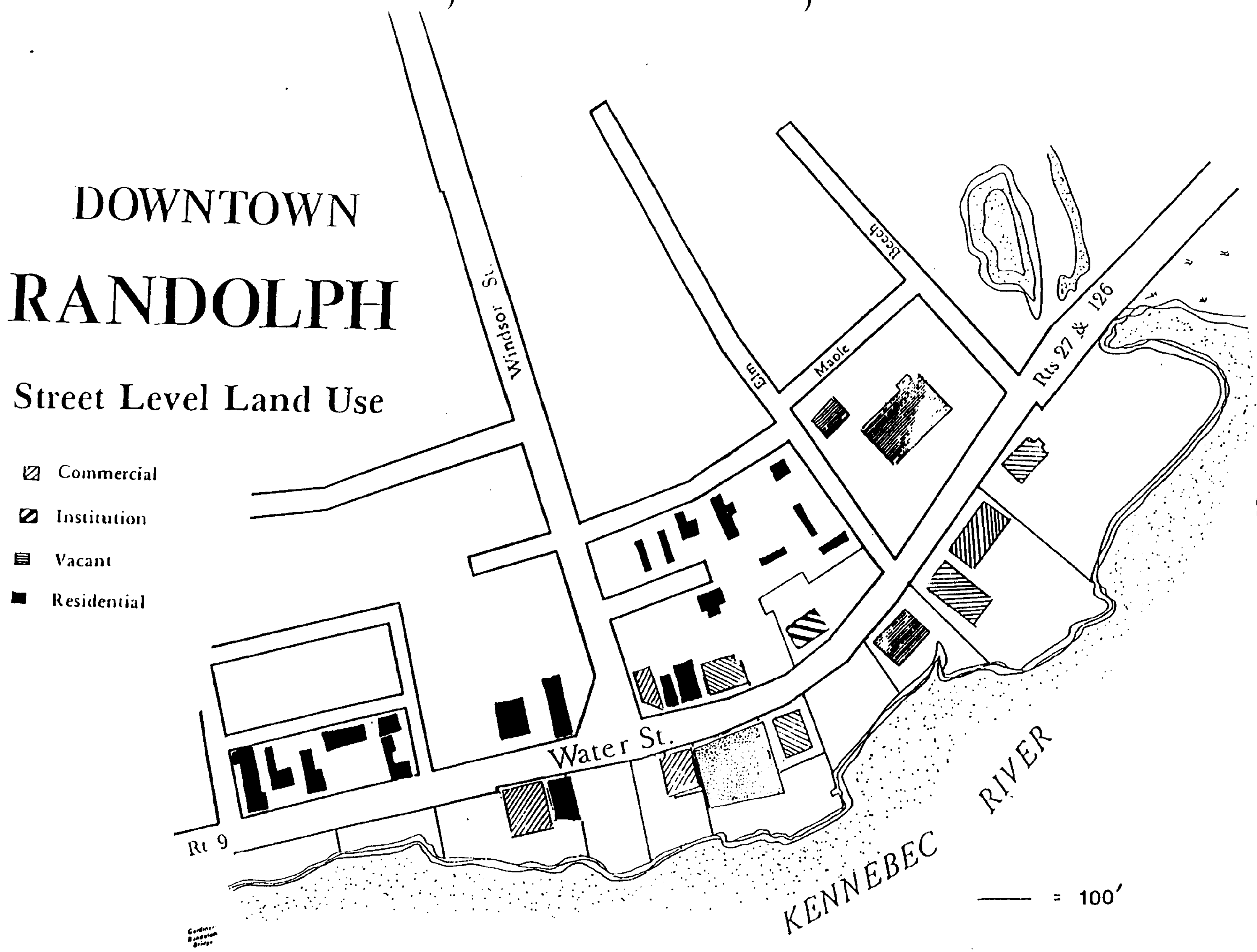

DOWNTOWN
RANDOLPH
Street Level Land Use
Commercial
Institution
Vacant
Residential
Windsor St.
Elm
Maple
Beech
Rts 27 & 126
Water St.
Rt 9
KENNEBEC
RIVER
= 100′

FIGURE 1

Traffic counts conducted by the Maine Department of Transportation prior to the bridge construction (none has occurred since) show that the greatest concentration of traffic occurred north of the bridge, the result of traffic bound for -- and from -- Augusta. (Figure 2)

The town's greatest concentration of commerce occurs just south of the current bridge, which is now just north of Central Street. Most commercial buildings in Randolph lie on Water Street, between Windsor Street and Beech, a private road. An average of 7,270 cars a day passed by these buildings in 1980, much of it commuter traffic which occurs in both directions, morning and evening.

The speed limit in the area is 30 miles per hour, but is not widely observed.

2. PROFILE OF LOCAL BUSINESS

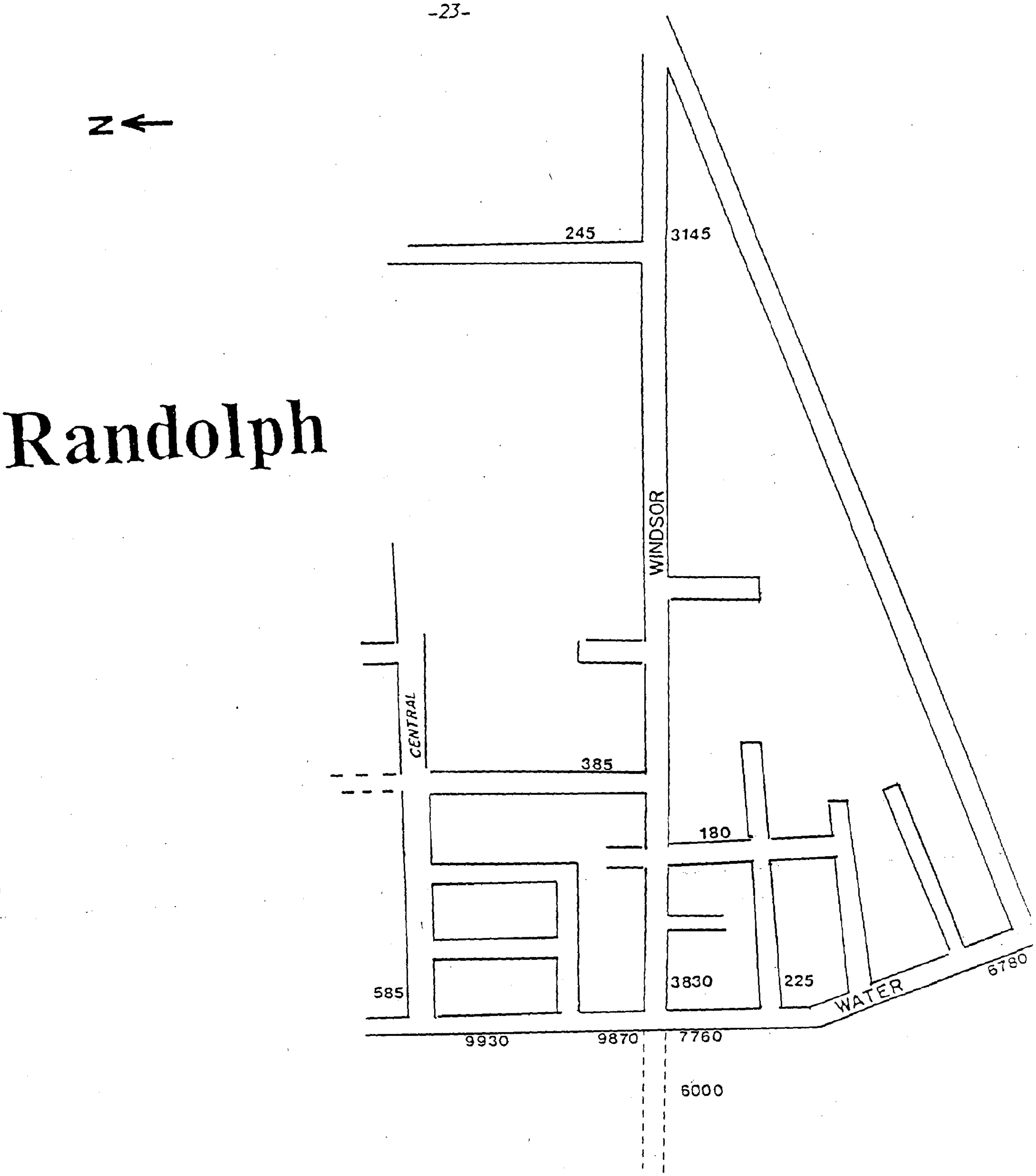
Of the more than 20 businesses operating in town, around one-third are within this central business district. These businesses represent the significant share of employment and estimated gross retail sales in the community.

Total commercial square footage in the town is put at 44,000 square feet, of which 28,800 square feet is in the central business district. This is all first-floor space.

Second floor space is dedicated almost exclusively to residential use in four commercial buildings with upper stories downtown.

2.1 Occupancy

Most of the central business district's enterprises are in owner-operated property, meaning that norms for monthly rent per square foot cannot be set from current occupants. Square footage for the operating businesses averages 4,000 square feet, but ranges from several hundred to 9,500.



Traffic Count Sites

1980

FIGURE 2

===

There are 20,200 square feet of vacant first floor space in 6 buildings, 3 of them in the core district. (Figure 1) Four residential buildings in the downtown represent 8,600 feet of first-floor space.

===

Town-wide, retail enterprises occupy 13,400 square feet; services, 6,387; and auto-related enterprise, more than 13,000 square feet. There are no sit-down full-service restaurants in the central district, and a pizza shop located along the secondary artery (Windsor Street) has closed.

Few structures remaining on the commercial segment of Water Street can be said to have architectural merit, with the exception of the brick structure housing the IGA. Facade restoration of several other buildings, however, might call forth their character.

2.2 Turnover

Most of the businesses along Water Street's core district have been in operation for many years. Of 12 business operators surveyed, nearly half had been in operation 30 years or more. Only one business reported starting up in the last year, replacing an existing and similar business. Most of the currently non-commercial buildings once housed businesses -- including a restaurant and variety store.

2.3 Vacancy

There is one vacant lot in the primary business district. (Figure 1)

Six commercial buildings included in an inventory of building use were predominantly vacant in April, 1986. Three were in the central business area -- two on the former foundry lot, which changed hands in 1985, and a cement block building previously rented as sales space and for warehousing.

3. EMPLOYMENT

Employers along the core district and others elsewhere in town reported that their employee numbers totaled 64 permanent full-time and part-time workers. Two-thirds of the employment occurs downtown, chiefly in the retail sector.

Employment levels among reporting businesses are unchanged since 1980, despite private sector job growth within the region of 1 percent generally and 8 percent in the trade sector. The closing of the foundry on Water Street, of course, reduced the gross employment in downtown Randolph by several dozen persons.

3.1 Payroll

==
The annual employee payroll for businesses in the Randolph commercial district is estimated to be at least $550,000.
==

This is based on the town total of 51 non-managementjobs, calculating an average wage of $175, plus $67,600 in permanent part-time jobs. Seasonal employees would push that tally even higher. Of reporting businesses with payrolls, most have annual outlays of more than $50,000, with several over $100,000. (Self-employed persons and the many family members employed in town would not be included in this tally.

4. SALES

Revenues among establishments reporting sales volume are estimated to have exceeded $5 million in 1985, most of them in retail trade.

Based on sales estimates, estimated average sales per square foot in the downtown, then, might be between $140 and $178 for both retail and service businesses, which is relatively high. Deviation from that norm, however, is significant, with sales in some considerably higher than the average.

RANDOLPH BUSINESSES

1. WATER STREET

Marine & snowmobile sales.
Laundry and dry cleaner.
Grocery.
Fuels.
Garage.
Gas and store.
Storage.
Auto repair.

Antiques
Plumbing.
Wood products.
Handbag manufacturer.
Ice cream.
Storage.

2. WINDSOR STREET

Pizza (closed in April.)
Auto body.
Auto body.

3. OTHER

Beauty salon.
Surveyor.
Builder.
Boarding home & other.
Garage.

==
Based on that average, however, the potential for first-floor revenues in vacant properties in town is at least $3.2 million, $2.5 of it in the downtown. Return of previously commercial buildings in the core business district to previous use would generate another $1.3 million downtown.
==

Nearly all businesses reporting 1985 sales said that sales had improved in the past five years. Only one reported decreased volume.

4.1 Customer Traffic

Customer visits -- daily customer base per establishment times the number of reporting enterprises -- do not change dramatically by season, since the region is not one of Maine's destination resort areas. Summer traffic brings perhaps a 5 percent increase in customer volume in Randolph.

Average visits per day vary by the nature of the business, ranging from several to 700. Enterprises generating the largest volume are the convenience sites such as the IGA and the gas-store stop on Water Street.

Broken out by customer type, patronage of these establishments suggests that non-residents make up more than 40 percent of the downtown customer base in Randolph. (Customer characteristics are discussed in detail in the next chapter.)

5. THE RIVER: RECREATIONAL ASSET

Although Randolph is located along a prime recreational and scenic amenity -- the Kennebec River -- its shores are a destination for only a few. The recently-completed nature trail along the old rail bed is a second amenity forged by community volunteers.

==
The value of recreation in downtown development lies in the fact that the cost of accommodating this visitor in terms of public services and taxes tends to be small. At the moment, Randolph is failing to capture the existing leisure market potential provided by its location on a major highway along a scenic river.
==

There is little to encourage the outsider to use the recreational opportunity within Randolph. A visitor passing through Randolph is given no direction via signage to any of the riverfront opportunities, although the railway trail is noted.

5.1 Lodging

Lodging facilities in the town and area are few. Although most users of the riverfront can be expected to be day-trippers, bed and breakfast opportunities in some of the more interesting older houses along Water Street are evident, with the most likely market the fall. (Summer travelers tend to be more desitination-oriented.)

5.2 Dining

There are currently no restaurants with seating capacity in central Randolph, although a take-out deli at the local grocery store is very active.

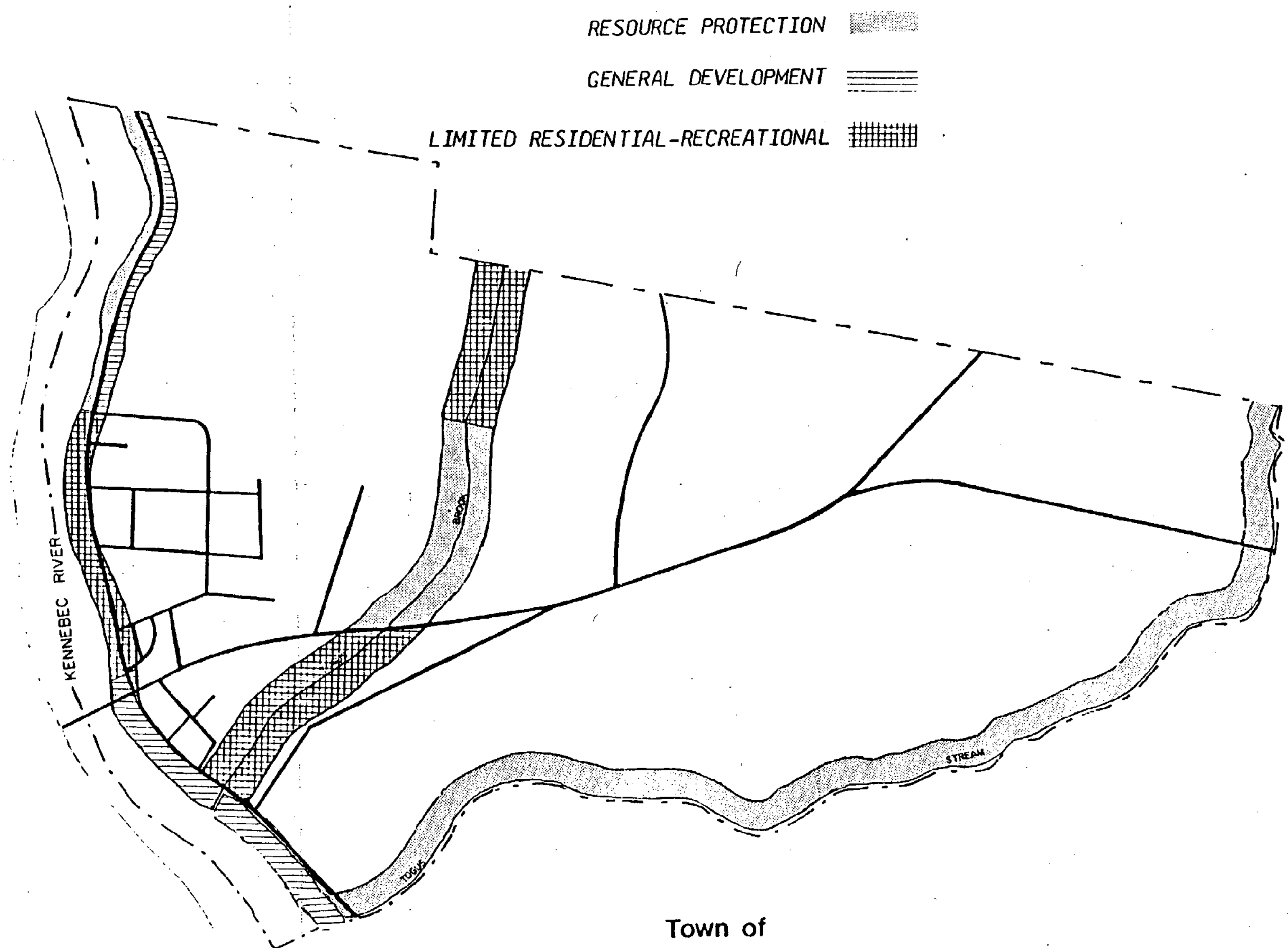
As the ensuing chapters indicate, the demand for more eating facilities in Randolph is considerable.

6. THE RIVER: DEVELOPMENT DEFICIT

The downtown's location in a flood district inhibits expansion and even improvements of building stock. The affected areas cover most of the downtown. (Figure 3)


Randolph
Flood Plain
STREET
FAIRVIEW
KINDERHOOK
STR
PINE ST
WINDSOR
WINDSOR
COURT
STREET
PLEASANT STREET
THIRD ST
CENTRAL
SECOND ST
RIVER
KENNEBEC

FIGURE 3



Town of
RANDOLPH
SHORELAND ZONING

FIGURE 4

In order to allow owners to qualify for flood insurance, the community has enacted Minimum Shoreland Zoning Ordinances which affect land within 250 feet of the normal high-water marks of the Kennebec River. These strips are divided into protected, generally developable and limited residential-recreational segments. (Figure 4) The downtown area is zoned mostly general development.

Federal regulations incorporated into the zoning ordinances discourage extensive renovation and require any new structure to have its lowest floor (basement included) above the elevation of the 100-year flood, which approximates the second-floor level for much of Water Street. In severe instances, new construction is prohibited, but houses listed on historic registers are exempted from all of the regulations.

==

Despite these impediments, new and improved uses of several buildings in the downtown are anticipated. Commitment to capital investment, working within flood regulations and flood-proofing, may set the pace for change in Randolph's commercial district.

==

7. INFRASTRUCTURE

7.1 Parking

There is no on-street parking in the core downtown. Off-street parking is provided by most of the businesses, and the town provides several hundred square feet of parking at the foot of Windsor Street, on riverfront land.

Parking is adequate for current use, with estimated average use of one in four available slots due to high turnover. Addition of 130 spaces would ensure supply for return of vacant and residential space downtown to commercial use. (A rule of thumb in designating adequate parking for a concentrated shopping area with a high retail quotient is 5.5 spaces per 1,000 square feet.)

Most parking is available to south-bound cars; north-bound cars have fewer public spaces to encourage stopping.

The more left-hand turns -- such as to parking -- a driver must make, the less encouraged he or she is to patronize a business. Since most of the core district commerce is currently on the riverfront and has parking accommodations already, it would be advisable to consider future parking space development on the other (east) side of Water Street, site of recommended retail expansion.

One consideration which must be addressed with any expansion of use in town is the need for expanded employee parking. Long-term parking which does not compete with consumers and clients -- and thus does not discourage turnover in consumer parking use -- should be made available to workers.

7.2 Shopper Amenities

Landscaping is almost non-existent in the commercial district, as are pedestrian amenities. No public trash recepticles or public rest-rooms exist. Sidewalks are inadequate and, in some instances, paved over. Otherwise attractive granite curbing has been painted yellow. In sum, downtown Randolph accommodates the automobile, not people.

Although the river courses behind the entire commercial area, it is not integrated with the business district other than to provide one semi-public boat launch and a planned docking facility at a town park at the entry to the district.

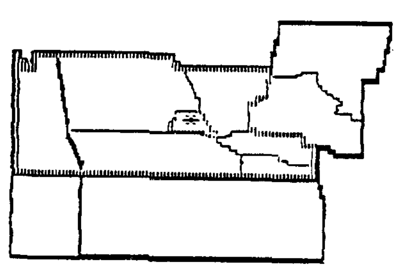
7.3 Utilities

Commercial Randolph is served by both water and sewer, with improvements planned for the near future.

Electrical and telephone service is primarily above-ground, with utility wires proliferating along Water Street.

::: ::: :::

Consumers



PROFILE OF THE DOWNTOWN:

STRUCTURE OF THE CONSUMER BASE

- *Randolph's commercial center draws strongly from non-Randolph patrons. Around half of persons interviewed on Water Street hailed from one of the other trading area towns.*

- *Nearly all of the consumer market base in Randolph and surrounding shopping sites was made up of Maine residents, a mix which changes slightly with the summer tourist season.*

- *The visitor or shopper population in Randolph tends to be similar in terms of income distribution, but dissimilar when it comes to age, family size and tenure in the area.*

- *Daily visits to Randolph's downtown are the rule, not the exception, while visits by consumers in competing towns are less frequent. This suports the convenience nature of the downtown.*

- *Nearly as many visitors intercepted in Randolph as in other sites had shopping plans.*

- *Gardiner is where consumers who patronize Randolph businesses go for family groceries, household goods and banking; Augusta is viewed as the locus for shoppers' goods and dining/entertainment.*

- *Half of non-Randolph shoppers visit or pass through Randolph routinely. The local marketplace is underutilized through lack of goods and services rather than through lack of consumer traffic.*

:: :: :: ::

PROFILE OF THE DOWNTOWN: STRUCTURE OF THE CONSUMER BASE

1. INTRODUCTION

Establishing a profile of existing and likely customer base is vital to determining prospects for Randolph's commercial district.

Specific identification of customer origins can be achieved through traffic, license plate and client register surveys. It can be achieved even more effectively through actual interviews of merchants and their customers and -- just as important in understanding motivations -- non-customers.

Both the existing and the potential consumer of goods and services in Randolph's commercial center are discussed in this chapter. The next chapter discusses consumers' image of Randolph and its downtown and their preferences for additional goods and services, the result of extensive surveying.

2. CONSUMER PROFILES

What cross-section of consumers forms the basic market for the local economy? Around 15,000 people -- locally based and transient -- drive through Randolph on an average day. Knowing where they are from and what they think is an initial step in assessing how to reach and service them.

A series of intercept interviews in Randolph and two other area towns was undertaken to establish a profile of the regional consumer base. With the able assistance of volunteers from the community development committee, visitors were interviewed at supermarkets in Randolph (81 people), in Augusta (73 people) and in Gardiner (87 people.) Interviews were conducted on both Thursdays and Saturdays.

Differences between the Randolph and non-Randolph groups in terms of personal characteristics such as residency, tenure in the area, age and household size emerged. For example, when asked how long they had been coming to or living in the area, 69 percent in Randolph had been residents of the region for 15 or more years. The figure was 53 percent for those shopping at outlying centers.

Exhibit 1

TENURE IN AREA

How long have you lived in or been coming to this area?

	Randolph %	Others %
0 - 1 Years	3	4
1 - 4 Years	3	13
5 - 9 Years	13	11
10 - 14	13	19
15 - 19	16	11
Over 20	53	42

Incomes of visitors to the three areas differed little. The proportion of low/moderate income householders -- those with aggregate household incomes of under $10,000 yearly -- was higher outside of Randolph than in other sites. (Exhibit 2)

Exhibit 2

HOUSEHOLD INCOMES

What is your total yearly household income?

	Randolph %	Others %
Under $10,000	21	29
$10 - $15	23	20
$15 - 20	23	21
$20 - 30	16	19
Over $30K	16	12

Age, however, proved a greater differentiating factor in the two segments. The Randolph visitor was considerably more likely to be between the ages of 25 and 34, while ages are much more evenly distributed (and more typical of the population at large) in the competing sites.

This characteristic affects the household size findings, with a larger proportion of households with four or more residents among the Randolph respondents.

Exhibit 3

AGE DISTRIBUTION

Would you mind telling me your age?

	Randolph %	Others %
Under 25	30	20
25 - 34 Years	10	19
35 to 44 Years	11	22
45-54 Years	11	13
55-64 Years	13	13
65-Plus	24	13

3. CURRENT MARKET CAPTURE

Who shops in or visits Randolph? Who doesn't?

3.1 Visitor Mix

Randolph's current downtown customers are roughly split between Randolph residents and out-of-town visitors. In fact, on the days interviewing was conducted, there were more non-Randolph residents (57 percent) at the shopping site (the IGA) than Randolph residents.

> Put another way, every other person intercepted in Randolph's commercial district in February was from out-of-town, most often (23 percent) from Pittston and from other nearby towns such as Whitefield.

The complexion of visitors in Gardiner reflected a much higher proportion of local residents than in Augusta -- 47 percent of Gardiner shoppers lived there, while only 20 percent of Augusta shoppers did.

3.2 Frequency of Visits

More visitors to Randolph's downtown stop there daily. Visiting habits in competing towns reflect less frequent trips -- and often greater distances traveled.

Among Randolph visitors and shoppers, 44 percent said they came downtown daily, compared to 22 percent elsewhere in the region.

> Chance plays a very small role in shoppers' presence in any of the areas. Only six percent of Randolph shoppers and 4 percent of those shopping elsewhere were at the site for an unplanned visit.

Most of the remainder of visitors to Randolph -- 46 percent -- are there weekly. This is true of 54 percent of shoppers in competing sites.

In the competing shopping towns, 29% of Gardiner visitors said they visit daily. 58 percent weekly. In Augusta, 14 percent visited daily, 49 percent, weekly, and 18 percent, monthly. In other words, Augusta is more of a destination/comparison shopper site.

3.3 Market Draw

Discussions with merchants in Randolph reflect a local market draw of customers that is definitely regional. As the breakouts on the next page suggest, half or more of clientele tends to be from a 20-mile radius, with a small tourist draw in summer.

Seasonal fluctuations are not great among existing businesses.

Convenience shopping was the overwhelming reason for visits to Randolph's commercial district. Among those not at the market to shop, most were seeking lottery tickets.

==

Of people interviewed in competing commercial districts, nearly half (45 percent) surveyed said that they do "visit or spend time" in downtown Randolph. Their presence in the commercial district is usually to see friends and relatives, but some did visit commercial enterprises and many, of course, drive through the town.

==

Of the non-Randolph shoppers, Gardiner visitors (50 percent) were more likely to spend some time in Randolph than were Augusta visitors (39 percent).

Those shopping elsewhere who said they do visit Randolph were asked what usually takes them to town. Those who do not visit were asked why not.

Just who patronizes Randolph's businesses is important to know. Please give us your best estimate of where your clientele comes from, by season.

	Longtime Randolph Residents		New Randolph Residents		% People from 20 mile radius		% Tourists		Other**	
A. Summer	[25 %]	+	[%]	+	[75 %]	+	[%]	+	[%]	= 100%
B. Fall	[25 %]	+	[%]	+	[75 %]	+	[%]	+	[%]	= 100%
C. Winter	[25 %]	+	[%]	+	[75 %]	+	[%]	+	[%]	= 100%
D. Spring	[25 %]	+	[%]	+	[75 %]	+	[%]	+	[%]	= 100%

● ●

A. Summer	[%]	+	[%]	+	[%]	+	[%]	+	[%]	= 100%
B. Fall	[%]	+	[%]	+	[%]	+	[%]	+	[%]	= 100%
C. Winter	[40 %]	+	[15 %]	+	[40 %]	+	[5 %]	+	[%]	= 100%
D. Spring	[%]	+	[%]	+	[%]	+	[%]	+	[%]	= 100%

● ●

A. Summer	[20 %]	+	[15 %]	+	[60 %]	+	[5 %]	+	[%]	= 100%
B. Fall	[20 %]	+	[20 %]	+	[60 %]	+	[%]	+	[%]	= 100%
C. Winter	[20 %]	+	[20 %]	+	[60 %]	+	[%]	+	[%]	= 100%
D. Spring	[20 %]	+	[20 %]	+	[60 %]	+	[%]	+	[%]	= 100%

● ●

A. Summer	[20 %]	+	[20 %]	+	[50 %]	+	[10 %]	+	[— %]	= 100%
B. Fall	[" %]	+	[" %]	+	[" %]	+	[" %]	+	[%]	= 100%
C. Winter	[" %]	+	[" %]	+	[" %]	+	[" %]	+	[%]	= 100%
D. Spring	[" %]	+	[" %]	+	[" %]	+	[" %]	+	[%]	= 100%

● ●

A. Summer	[- %]	+	[- %]	+	[75 %]	+	[- %]	+	[25 %]	= 100%
B. Fall	[%]	+	[%]	+	[" %]	+	[" %]	+	[" %]	= 100%
C. Winter	[%]	+	[%]	+	[" %]	+	[" %]	+	[" %]	= 100%
D. Spring	[%]	+	[%]	+	[" %]	+	[" %]	+	[" %]	= 100%

● ●

A. Summer	[%]	+	[%]	+	[20 %]	+	[80 %]	+	[%]	= 100%
B. Fall	[%]	+	[%]	+	[50 %]	+	[50 %]	+	[%]	= 100%
C. Winter	[%]	+	[%]	+	[100 %]	+	[%]	+	[%]	= 100%
D. Spring	[%]	+	[%]	+	[100 %]	+	[%]	+	[%]	= 100%

● ●

A. Summer	[45 %]	+	[5 %]	+	[45 %]	+	[5 %]	+	[%]	= 100%
B. Fall	[" %]	+	[" %]	+	[" %]	+	[" %]	+	[%]	= 100%
C. Winter	[" %]	+	[" %]	+	[" %]	+	[" %]	+	[%]	= 100%
D. Spring	[" %]	+	[" %]	+	[" %]	+	[" %]	+	[%]	= 100%

Market Draw

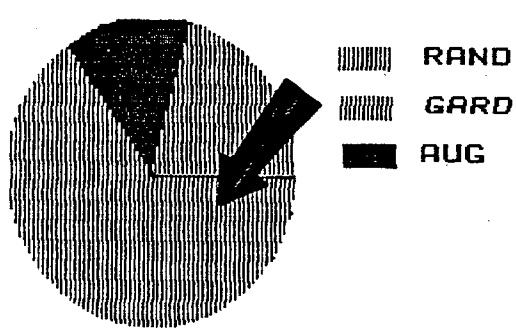
==
The perception that there is nothing to do in Randolph -- in the words of one person, "Go? What for?" -- predominates among those who do not spend time in or visit the town.
==

3.4 Shopping Preferences

Each respondent surveyed in downtown Randolph was asked where he or she shopped or visited for 12 different purposes, ranging from food shopping to professional services such as health care or legal assistance.

==
The key to patronage in Randolph is convenience, not price or selection. One-third of Randolph respondents said they go elsewhere to shop for items already available in town, usually because of price.
==

But as the following graphs show, local patronage of the convenience stores and of the laundry is quite high. Other local businesses have considerable support, too. (Appendix)



CONVENIENCE ITEMS

FIGURE 1

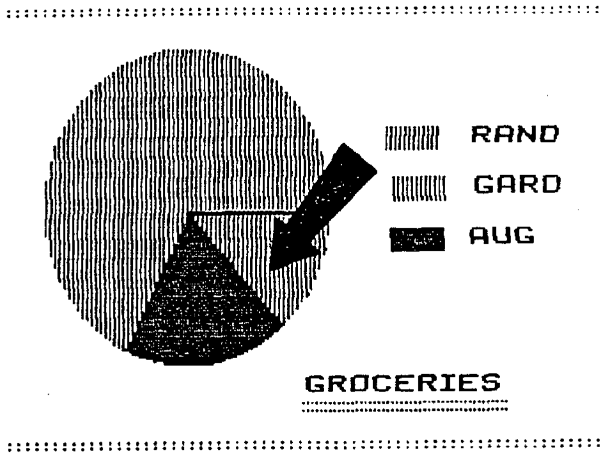


FIGURE 2

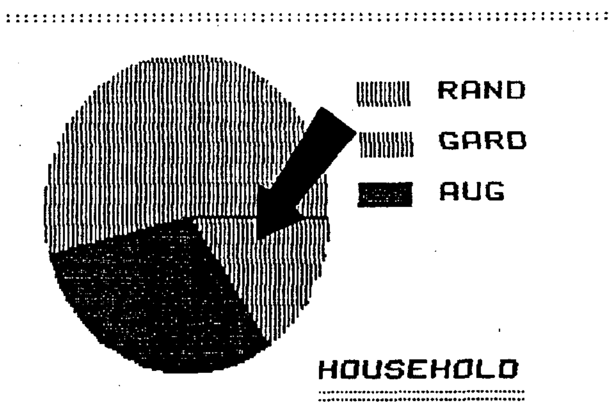


FIGURE 3

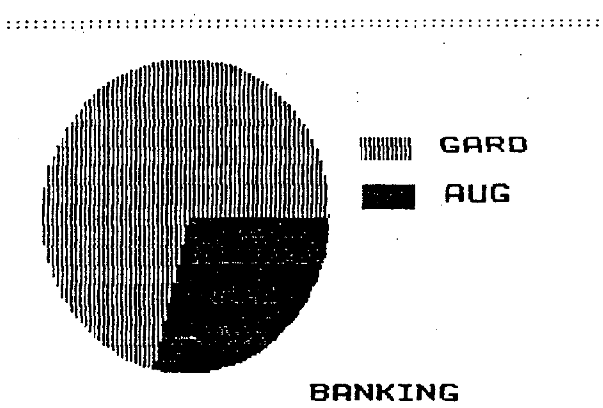


FIGURE 4

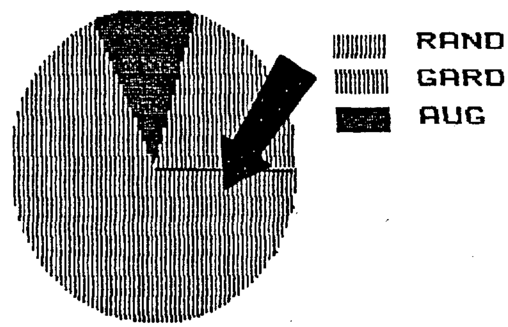


FIGURE 5

For those in retail trade in Randolph, most of the competition for Randolph customers is right across the bridge. Business operators in Randolph see Gardiner drawing townspeople for household goods and bank services.

For most people in Randolph, Gardiner is the primary shopping locus for weekly grocery and household goods. For entertainment, dining, clothing and health/legal services, they tend to visit Augusta.

Differences in buying habits emerge among shoppers in the two competing sites of Gardiner and Augusta.

For example, Gardiner visitors are more likely to shop for food in Gardiner (71 percent vs. 52 percent in the Augusta sample). Augusta competes most strongly for Gardiner visitor patronage in clothing sales, auto needs, and dining and entertainment.

Given these consumer patterns, what do the current and potential patrons of Randolph's downtown see as the most-needed elements of a revitalized downtown? Their views are assessed in the next chapter.

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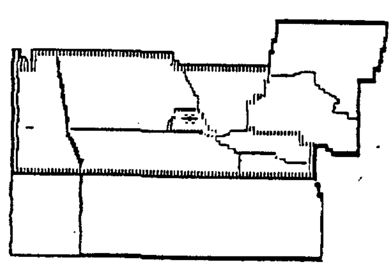
Views of Randolph



PERSPECTIVES & PROSPECTS:

RANDOLPH CONSTITUENCIES' VIEWS

- Business operators, property owners in the commercial district, local shoppers and shoppers in outlying towns were approached for their views of Randolph.

- The four general constituencies identified often concur in their perspective of Randolph's economy, in their views of its needs, and in their choice of revitalization components.

- Riverfront improvement and expansion of the commercial mix are seen as vital to resurgence.

- Nearly all businesses report that their business volume has improved since 1980. Most are optimistic about the potential for business expansion despite inevitably voiced concern over the severe constraints of flood plain regulations.

- However, the local economy is seen as mediocre or worse by most members of the business community.

- Enhanced promotion in Randolph would be well-received: more events and social functions drew significant support.

- Location and the riverfront are the primary factors in Randolph's marketability.

- A restaurant and a greatery variety of shops and stores clearly are the key to drawing both local and regional shoppers to Randolph. A bank draws considerable support, as well.

PERSPECTIVES & PROSPECTS:
RANDOLPH CONSTITUENCIES' VIEWS

1. INTRODUCTION

Perspectives of the Randolph commercial district were elicted from more than 300 people in and out of Randolph in surveys of several specific constituencies -- shoppers, business people and property owners in the commercial zone.

In each, the assets and deficits of the downtown were explored, along with views on the most desirable ways of revitalizing the commercial district's economy. Reasons for visiting -- or not visiting -- Randolph were explored, along with shopping patterns.

Participants were asked also to rank a series of items which might enhance commerce in the Randolph business district, ranging from more landscaping to more events and social functions. The respondents were given a scale of five rating options, ranging from very important to unimportant.

Populations interviewed with the help of community development volunteers (see Appendix for complete survey results and comments) included

- *shoppers and visitors in the Randolph business district;*
- *shoppers and visitors in Gardiner and in Augusta;*

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- o shoppers and visitors in the Randolph business district;
- o shoppers and visitors in Gardiner and in Augusta;

- o merchants and operators of businesses and services in the Randolph business district; and
- o owners of property in the Randolph commercial sector.

2. BUSINESS PERSPECTIVE

Businesses within the Randolph study area were surveyed to determine businesses' characteristics, economic activity, business plans, and the commercial community's views of the local economy and downtown revitalization. All businesses on Water Street and several elsewhere in the community participated in either a written survey or personal interviews by a researcher. The 12 participating businesses represent an estimated 95 percent of revenues generated in the community.

Highlights of the views their owners and operators expressed include the following:

- o Nearly all businesses report that their business volume has increased since 1980.
- o Most are optimistic about the potential for business expansion despite inevitably voiced concern over the severe constraints of flood plain regulations.
- o However, most proprietors rank the health of the local economy below the region's.
- o Riverfront improvement is considered, by far, the most important element in stimulating the town's economic well-being.
- o Expansion of the commercial base proves a high-level concern, with general favor toward a more structured downtown commercial district.
- o Year-round population growth is considered an important element in Randolph's economic future also. Half of the business respondents rated this factor as very important.
- o Low interest loans and better, perhaps cooperative downtown promotion draw support.

COMMENTS

From Randolph Businesspersons.

* *What other businesses would you like to see locate in downtown Randolph?*

Bank

Specialty Shops, clean industries, health services, etc.

Any business that brings people is good for all business.

Drug store, Bank, restaurant, any type of recreational business.

Doctors and lawyers offices. Speciality shops.

Any type of business that would employ people.

Bank, drugs, car station, quick stop, speciality shops.

Bank, drug store, barber, lunchroom.

* *What do you think is the Randolph Downtown Commercial district's greatest asset when it comes to business success?*

Nice area, clean air, pretty scenic

Rt. 9 & 27, Rt. 226 - Riverfront. Location (easy access).

Rt. 27.

I don't think there is any question about it, the large amount of traffic traveling through Randolph's commercial district is the town's greatest asset. The Kennebec River could be an asset but due to the flood laws it hinders development and is Randolph's major problem. Outlying towns such as Pittston, Whitefield, Chelsea and Dresden are where most of Randolph's commercial business comes from. Randolph by itself could not support much for businesses.

Traffic

Rt. 27 and the Kennebec River.

Good location, easy access.

COMMENTS

From Randolph Businesspersons.

* *What would bring more business to your particular operation in Randolph and improve the economy of downtown Randolph in general?*

More building construction.

Ability to expand facilities (would require change in type of construction.)

Beautification of the town.

A small shopping center would definitely bring more business to every business in town. Larger grocery store, drug store and bank, etc. would be the answer.

More businesses.

Industry.

* *If the opportunity just checked off in the previous question (#20) actually occurred, what specific changes or improvements would you use it for in your business?*

Complete work scheduled for several years sooner.

Add a different business to existing property (we have space).

If we could double our sales area I feel we could do [considerably more per week] .

* *If you were describing downtown Randolph to a friend who had never seen it, what - in a sentence or two - would you say?*

Beautiful, riverfront area - country-like setting - close to major shopping areas, etc.

One-grocery store (IGA), two garages, one service station, one Marine supply and a fire station.

Nice little town - not much there, but growing.

Don't blink or you might miss it.

Small town - few stores, nice place to live.

Very little businesses - more of a bedroom community.

==

To the region's consumers, the primary needs appear to be availability of household shopping goods and of some recreational opportunity -- especially dining and use of the riverfront.

==

2.1 The Local Economy

In the eyes of the merchants and business operators, the Randolph economy falls short of that of the region's. Asked to "grade" both the Randolph and the regional economies using the traditional A through F of the schoolroom, most respondents gave the town's economy an average or near-failing grade, while the regional economy passed with a "C" or better.

2.2 Downtown Assets & Deficits

The traffic volume and a convenient location on Rte. 27 are the key assets "when it comes to business success," according to these business people. The Kennebec River is mentioned also.

"Don't blink or you'll miss it," was what two business operators said about Randolph when asked how they would describe the town to someone who had never seen it. "More of a bedroom community," said another.

The recognition prevails that the commercial district, and the town generally, lacks a magnet beyond the market to draw the many potential customers passing through town. Asked what would bring more business to their enterprises in particular and to the downtown generally, respondents frequently cited a bank and an eating establishment, among others.

A generally improved appearance and improved use of the waterfront were also considered important.

3. OWNERS' OUTLOOKS

Most other properties in the target area are residential sites. Owners of 35 non-commercial properties were surveyed to determine their properties' characteristics, owners' plans for the property, and the owners' views of the local economy and downtown revitalization.

Of these respondents, 59 percent were owner-occupied residences. Nearly half of properties have been owned for more than 20 years. (See Appendix C)

==

The town commercial district's location is its greatest asset, in the view of these property owners.

==

By this, they mean easy access for both residents and transients, proximity to high traffic volume and to the Kennebec River.

Commercial development -- especially of small-scale retail and services -- and dressing up the downtown were favored as catalysts for a better downtown economy. (See Appendix C)

The owners differ somewhat from the merchants and business owners -- although in some instances they are the same people -- by being considerably less emphatic about the importance of given efforts in influencing business growth, as the following exhibit shows.

==

More than half of these owners said that they thought the single effort most useful to the Randolph economy would be development of a planned shopping/commercial district for the town.

==

Exhibit 1

INCENTIVES FOR ECONOMIC GROWTH

If you were to rank the importance of the following for downtown Randolph's economic future, what would you rank it:

*M = Merchants/Businesses
P = Property Owners
R = Randolph Visitors/Shoppers
O = Visitors/Shoppers Elsewhere

PERCENT RESPONDING

		Very Important	Important	Somewhat Important	Unimportant	Don't Know
Enhanced landscaping	*M	[38]	[50]	[13]	[0]	[0]
	P	[17]	[21]	[29]	[21]	[12]
	R	[26]	[32]	[23]	[6]	[12]
	O	[16]	[37]	[19]	[11]	[17]
Sidewalk/curb improvement		[0]	[63]	[25]	[13]	[0]
	P	[16]	[40]	[20]	[12]	[12]
	R	[37]	[32]	[25]	[5]	[1]
	O	[19]	[45]	[16]	[4]	[16]
Housing rehabilitation	M	[38]	[50]	[13]	[0]	[0]
	P	[33]	[29]	[12]	[17]	[8]
	R	[--]	[--]	[--]	[--]	[--]
	O	[--]	[--]	[--]	[--]	[--]
Off-street parking	M	[38]	[13]	[25]	[25]	[0]
	P	[18]	[14]	[23]	[41]	[5]
	R	[30]	[40]	[11]	[17]	[2]
	O	[28]	[40]	[11]	[6]	[15]
Sign improvement/design	M	[38]	[25]	[25]	[13]	[0]
	P	[13]	[39]	[4]	[30]	[13]
	R	[23]	[33]	[26]	[16]	[2]
	O	[9]	[35]	[22]	[19]	[16]
Park/recreation additions		[38]	[25]	[38]	[0]	[0]
	P	[27]	[41]	[18]	[9]	[5]
	R	[42]	[36]	[10]	[7]	[5]
	O	[28]	[33]	[18]	[8]	[13]

Exhibit 1 (Cont.)

INCENTIVES FOR ECONOMIC GROWTH

If you were to rank the importance of the following for downtown Randolph's economic future, what would you rank it:

PERCENT RESPONDING

		Very Important	Important	Somewhat Important	Unimportant	Don't Know
Promotional program	M	[25]	[50]	[25]	[0]	[0]
	P	[12]	[38]	[21]	[25]	[4]
More info on what's on downtown	R	[17]	[46]	[15]	[17]	[5]
	O	[15]	[36]	[25]	[8]	[15]
Visitor info. center	M	[13]	[0]	[25]	[63]	[0]
	P	[4]	[9]	[30]	[48]	[9]
	R	[11]	[28]	[22]	[26]	[2]
	O	[11]	[25]	[19]	[24]	[21]
Pedestrian amenities (Benches, trash bins)	M	[25]	[25]	[25]	[25]	[0]
	P	[8]	[25]	[50]	[12]	[4]
	R	[25]	[42]	[15]	[14]	[5]
	O	[17]	[40]	[19]	[9]	[15]
Reduced speed limits	M	[38]	[38]	[13]	[13]	[0]
	P	[36]	[28]	[12]	[20]	[4]
Greater variety of stores/shops	R	[56]	[31]	[4]	[9]	[1]
	O	[64]	[21]	[2]	[1]	[13]
Historic preservation	M	[0]	[38]	[13]	[50]	[0]
	P	[4]	[21]	[29]	[37]	[9]
	R	[15]	[36]	[22]	[22]	[5]
	O	[16]	[32]	[26]	[10]	[16]
Yr-round pop. growth	M	[50]	[13]	[25]	[0]	[13]
	P	[14]	[27]	[14]	[32]	[14]
Riverfront improvement	M	[63]	[37]	[0]	[0]	[0]
	P	[48]	[26]	[13]	[9]	[4]
More social functions/ events	R	[57]	[21]	[10]	[10]	[2]
	O	[40]	[28]	[12]	[4]	[16]
A restaurant	R	[57]	[21]	[10]	[10]	[2]
	O	[50]	[25]	[6]	[5]	[14]

<u>Location</u> is a major asset, lack of commercial variety a major <u>deficit</u>, when commercial district property owners are asked their views about the village commercial district. (See Comments, Appendix C)

4. POPULAR VIEWPOINTS

A total of 241 shoppers and visitors, roughly one-third in Randolph and one-third each in Gardiner and Augusta, gave their <u>views on what improvements or changes they thought would bear most positively on the economy of the Randolph business district.</u>

A greater variety of shops and stores proved the ranking choice among all respondents, with respondents in competing centers even more emphatic than those interviewed in Randolph.

Fifty-six percent of participants on Water Street and 64 percent of those who were interviewed in Gardiner and Augusta ranked the need for greater commercial variety as "very important." (Gardiner visitors were more emphatic than Augusta ones.) Generally, though, the differences between the two groups was small. (Exhibit 1) The emphasis of the <u>kinds of stores</u> did differ, however.

The Randolph respondents tended to cite a need for establishments meeting daily household needs -- especially a bank, but also clothing, drugs and baked goods. Shoppers interviewed elsewhere tended to cite specialty items and to see <u>entertainment and recreation</u> as more important.

For both populations, <u>a restaurant</u> generated strong support.

Among Randolph shoppers, "more social functions and events" was ranked next (57 percent rating it "very important"), followed by park/recreational additions (42 percent "very important") and , sidewalk/curb improvement (37 percent).

4.1 Greatest Assets

The Randolph commercial district's greatest asset, respondents seem to agree, is its convenience -- which means both location and its relative lack of crowding.

4.2 Market Information

How do consumers learn about commercial activity or offerings? Establishment of a productive promotional program for the Randolph commercial district will require some sense of how consumers learn about events and commercial opportunity downtown.

Circulars and newspapers, rather than radio or television, are the chief formal sources of information about business sales and services for both local and outlying shoppers.

> *A key consideration in the selling of the Randolph commercial district will be in countering the image -- if not reality -- of "nothing to do" in town.*

5. INCENTIVES TOWARD CHANGE

Given greater variety downtown, business operators believe, Randolph's economy would grow.

5.1 Capital Investment

One enterprise with the ability to draw customers from outside -- as well as inside -- Randolph has significant capital investment plans for the near future.

A number of business operators who own their plants are discouraged from capital investment by flood plain regulation restrictions. In several instances, owners are near retirement age and have little incentive to invest in change.

==

Specific renovation -- as opposed to general maintenance and repair -- is anticipated for the now-defunct foundry on the east side of Water Street. Plans to convert the site to a grocery store with 5,000 square feet are being considered. With implementation of the plan, the brick structure housing the existing grocery store, also on Water Street, would be converted to other use.

==

This change and new ownership of several key Water Street buildings positions Randolph for the possibility of coordinated revitalization of the downtown economy.

In the following chapter, suggestions for meeting some of the unmet needs expressed by the various constituencies in the local marketplace are presented.

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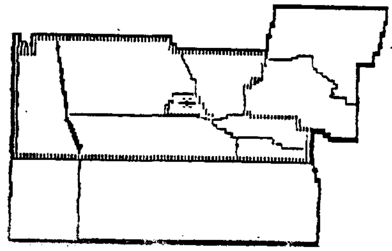
Recommendations



T H E C A S E F O R R A N D O L P H: S T R A T E G I E S

1. *I N T R O D U C T I O N*

The Randolph commercial district is architecturally disunified and does not meet its effective sales capacity in the local and convenience markets. Its commercial base is being challenged by that in surrounding small towns which provide much of its revenues.

The time to put a forward-looking commercial strategy in place in Randolph is now.

2. *P A T H W A Y S*

Three broad pathways to achieving a revitalized downtown can be followed. They address the

- *physical environment,*
- *marketing evironment,*
- *and business growth.*

==

In sum, they suggest that the downtown stay in its current location, with the concentration of new retail activity on the east side of Water Street. In time, an eventual riverfront focus can develop on the west side of the street.

==

Other recommendations include:

- *An immediate need for focus on the downtown. Randolph's business area has no entrances and no exits. There is nothing to tell people they have arrived, and no sense of having departed. Signage and landscaping around the bridge and near the Togus Brook trail should be installed.*

- *The relocation of town offices from Water Street to a less valuable site, with redesign of the existing building for new commercial use. Profits from leasing or sale to go to revolving commercial loans, outright purchase of riverfront access land.*

- *Establishment of a public riverfront commission to establish public policies for and development of the riverfront, including the seeking of easements, licensing of vendors, and outright purchase.*

- *Planning for an integrated commercial area with new focus behind and between buildings, allowing a place for pedestrians and for community. This might be in the area between Windsor and Beech streets, with the possibility of lower Elm becoming a pedestrian walkway. (Figure 1)*

- *Addition to the commercial mix of a garden/nursery, both a restaurant (riverside) and some faster food sites, a bakery and, during boating season, a colorful pushcart/market garden which meets the needs of boaters and transients while overcoming the constraints of new building in the shoreland area.*

Table 1 presents a profile of some possible new businesses, reviewing median sales/square foot according to national norms and median square footage. In addition, the businesses are scored for a sense of their market attraction.

2.1 Physical Improvement

The physical environment pathway approaches means of improving the structural and aesthetic environment downtown, including facade improvements, sign guidance, parking, access, limited historic preservation, and pedestrian amenities.

Riverfront improvement is an imperative physical element in the resurgence of the Water Street economy.

2.2 Marketing Pathways

The marketing environment presents means of countering the "nothing-to-do" image of commercial Randolph and directly considers increasing the rate of capture of travelers in town.

These programs include a centennial events allocation and panel, a unifying visual scheme for buildings, design of an "entry" and "exit" to town, new signs and recreational directional markers throughout town.

An extremely valuable factor in the developing of an enhanced image of Randolph will be the celebration of its Centennial in 1987.

2.3 Business Growth

The business growth environment proposes different types of economic growth in the town and suggests their value to the community. Restaurant development, retail convenience expansion, a riverfront retail effort through licensing of colorful pushcarts, and a garden market are among the concepts proferred.

The justification for business expansion can be expressed by a number of measures in Randolph, including the apparent commitment of several local businessmen to plan expansion or improvement of their properties.

In addition, for example, one can work with known numbers for nearly any enterprise to achieve a sense of how well the marketplace might support a new or expanded venture.

Demand for a restaurant or sit-down eatery was evident from consumer interviews, for example.

Between 10 and 20 percent of meals are eaten out today -- the equivalent of 4 percent of disposable income. For the 20,000 people in the Randolph trading area -- not counting the 20,000 people in Augusta -- this means the equivalent of more than 3 million meals eaten out a year.

==
Based on average sales and space needs, this market would accommodate at least a dozen restaurants based on the local population alone. (Restaurants, however, tend to draw from a larger radius.)
==

The number of enterprises which the market will support must be understood before a business commitment is made. In Randolph, where much of the key is convenience, the market is often the traffic flowing through town. Specialty shops and others not drawing convenience buyers must target their markets more precisely.

===
Consideration of traffic flow, parking, current expansion plans, and the chance to return part of the community to the shopper (instead of the auto) suggests that the Water Street section between Windsor and Beech become a planning segment.
===

Parking behind the buildings, and development of entries at the rear would remove shoppers from the main street. Walkways and park-like amenities would complement this environment, and a crosswalk between Elm Street and the riverfront could have a pedestrian-controlled light.

===
Strolling is a lost Randolph pastime, but it is a requisite for the recreational visitor. Pedestrian amenities should be encouraged along the riverfront, too.
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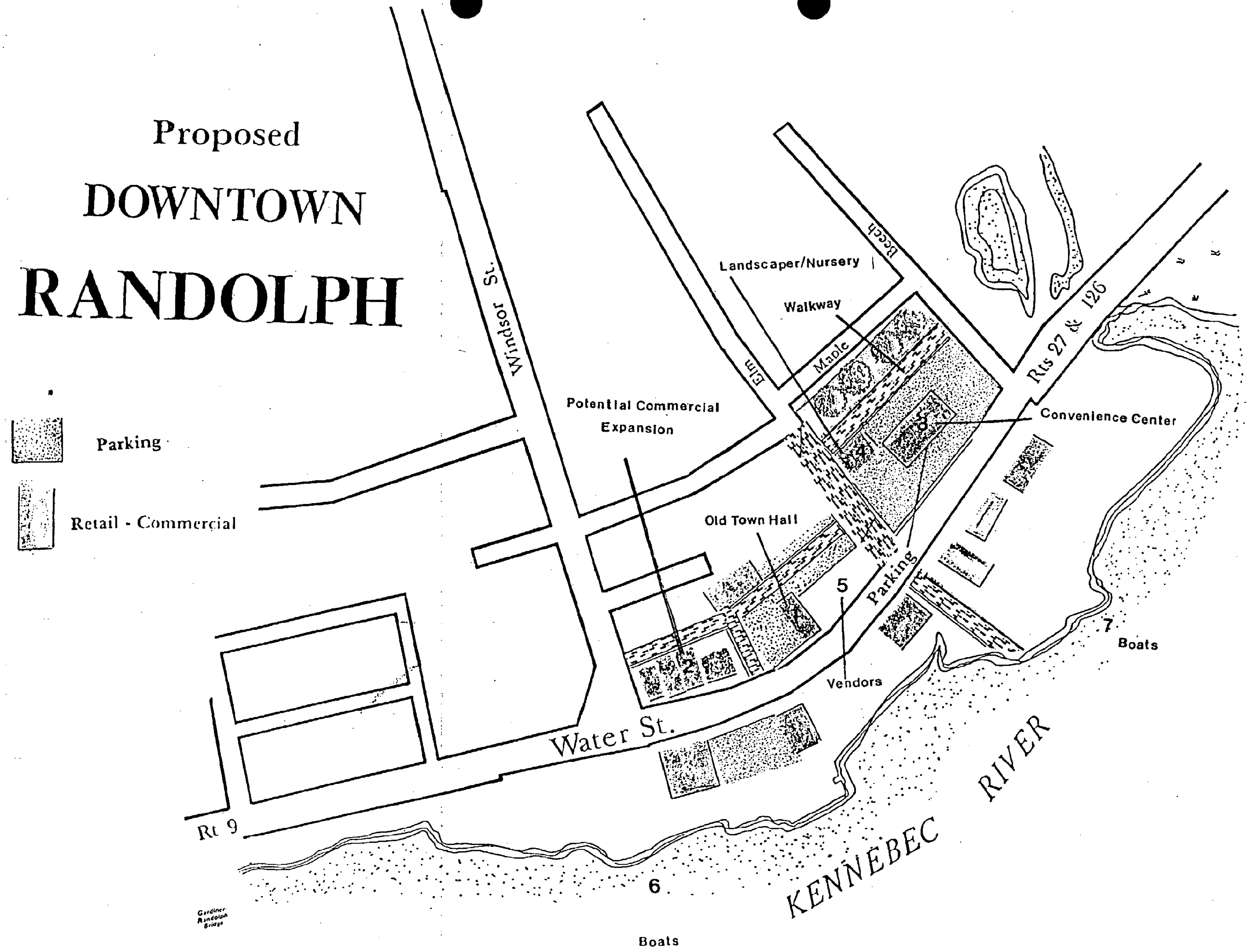
Proposed DOWNTOWN RANDOLPH



The concept does not envision any new buildings, but, rather, eventual re-use of existing buildings as commercial demand expands. Location of a small bank with a drive-up window or ATM could probably be justified once some growth emerged, based on volume, on consumer demand, and on the absence of such a facility in a long stretch of the west side of the river.

3. FINANCING THE PROGRAMS

Several maxims hold true in the financing of these programs.

First, it is important that any program be able to be implemented reasonably easily. This requires reasonable cost and relatively straightforward steps in the task both for the sponsors and for any participants. Thus, recommended programs for the first two years are not costly and are "do-able."

Success in downtown redevlopment begins with small but visible steps.

Second, community participation is a requisite. This includes community financial support. Recommendations include civic group projects similar to those already accomplished with such care along the old rail bed.

Third, the town and its supporters should recognize the reality of the return on investment. For example, revolving loan funds for facade restoration and other improvment projects are known to leverage $1 of borrowed funds to $3 of extra, private investment.

In other words, for every $1 borrowed, $3 more is spent, a significant boost to a local economy. In the case of visitor promotion, which should be applicable to riverfront advertising, a rule of thumb is that for ever $1 spent on promotion, $4 will be spent in return by tourists.

Tax benefits should accrue, also. Restoration and eventual business use of the vacant or underutilized buildings downtown would not lower the tax rate radically initially from a valuation basis, but in the longer term -- as the buildings change hands and property values rise -- those restored structures will bear broader tax burdens and their renewed use will contribute to the local economy.

The town should continue to seek all the government grants or financial support for which it qualifies, bearing in mind the reality of diminished available funds.

These programs are those which look toward goals of housing improvement or expansion; employment stability or expansion via stimulation of private investment and community revitalization activity; and installation, rehabilitation and replacement of public facilities.

Benefit for low and moderate income residents must be demonstrated, and projects must, among other things, not otherwise be fundable; preserve and promote existing neighborhoods and community centers; preserve historically valuable structures; stimulate investment from other sources; and be innovative.

Other funding or support mechanisms from regional or foundation sources are available, also. These include the Maine Development Foundation, which can offer strategic planning and capital generation; the Maine Department of Transportation, which owns some riverfront property; the national Main Street program and state historic preservation specialists.

4. P R O G R A M S

In the ensuing pages, the programs recommended for revitalizing downtown Randolph are outlined under the three categories discussed earlier.

In each instance, the recommendation tries to include a review of the

- *program;*
- *likely financial resources;*
- *administrative and informational resources;*
- *marketing value of the concept;*
- *costs;*
- *benefits, and*
- *proposed schedule.*

:: :: :: ::

RANDOLPH

POSSIBLE RETAIL

		Food Clusters	Small Appliance /Elec-tronics	Bank/ ATM	Rest'rnt (Liquor)	Nursery/ Garden Store	Bakery	Family Clothes		Books - Gifts - Tapes	Catalog Center
Convenience		1	3	1		1	1	2			2
Traffic-Draw		1	2	1	1		1	3			
Shopper Draw		2	2	2	1	1	1	2		2	1
Recreation-Oriented Amenity (River)		1			1		1	3			
Off-Hours		2		1	1			3			
Entertainment		1	2		1			3		1	
Leisure Lifestyle		1	1		1	1	1	3			1
Year-Round		1	1	1	1	2	1	2		2	2
Commuter		1	3	1	3	1	1	1		1	3
Tourist/Visitor		1	-	3	1	3	1	1		1	3
Median Square Feet		2000	1500 - 1800	676	2600	N/A	1,600	2100		1500	1200
Median Sales/ Square Feet		104-151	93-125	-	99		109	120		98+	N/A

1 = HIGH 2 = MEDIUM 3 = LOW

MARKETING ENVIRONMENT

	BUSINESS ASSOCIATION	RIVERFRONT COMMISSION	NEW TOWN SIGNAGE	EVENT DEVELOPMENT
Program Description	Already in place. Review revitalization program. Consult w Maine Development Foundation to raise capital, implement strategic planning.	An appointed or elected public entity with authority to raise and spend funds, seek conservation easements and accept donations, with its mission to restore the shoreline to increased public access.	Create signage at entries to town. Add recrea/biz directional signs outside biz dist. Town business directory @ IGA.	Centennial is a very big plus, & planning must begin now. Summer event along river? Boating extravaganza on 4 July along with NYC & Miss Liberty celebration.
Financial Resources	Dues.	Town funds via sale of property & budget, donations. Profits.	Town $$. Other.	Profits from events. Publicity.
Administration/ Information Resources	Self-administered. Meet w. Gardiner Board of Trade to exchange cooperative ideas --- Richard Kelso, Executive Director.	Self-administered. Ex-officio members from planning bd. & town officers.	Business association.	Community development panel.
Marketing Value	Synergy.	Coordinated & effective promotion. A lobby for the riverfront.	A focus for the downtown, giving sense one is entering/exiting Randolph.	Dispels "nothing to do" image.
Estimated Cost	None.	$2,000 Seed Money.	$500 per plus labor.	
Benefits	Crossing of ideas; better understanding of total market. Management & implementation of marketing/promotional plan. Efficiencies.	A way to give the river a "voice" & to underscore value of this asset. Control of vendor plan. Generate events to draw into marketplace. Every $1 outlay --> $4 revenue.	Focuses visitors on retail and commercial opportunity. Directory encourages patronage of less visible businesses.	
Schedule	Perpetual.	Enact at 1987 town meeting.	Summer-Fall '86	Summer '86 - '87

PHYSICAL ENVIRONMENT

	FACADE IMPROVEMENT	COOPERATIVE PURCHASING	EXIT/ENTRIES	VISUAL SCHEME	PEDESTRIAN FOCUS
Program Description	Encourage restoration of facades on all commercial buildings.	A community organization purchases building materials in enough quantity to lower unit cost. Resale to rehab projects saves owners $$ and makes small profit for provider.	Entries/exits to town should be delineated w, signage & shrubbery. Us same foliage as at War Memorial?	Integrate by design, not "theme." Ie, sign designs, awnings, shrubs, brick walks and WOOD.	Pedestrian plan, looking to alleys & to the backs of buildings for respite from the highway.
Financial Resources	R E V O L V I N G L O A N Add to existing fund for $48,000 total, 3/4 from financial institutions @ $12,000 per, plus any add'tl grants (CDBG, Natl Trust) or donations.		Public works.	Private investment.	Public funds if necessary. But could go via private investment & some facade improvement $$.
Administration. Information Resources	Bank administer according to credit & use criteria. "Keeping Up Appearances: Storefront Guidelines," Nat'l Trust, 1983.				Landowners. Town may be on prime spot -- could dictate use. Landscape architect.
Marketing Value	Aesthetic asset/image enhancement. Banks enjoy good will as catalysts for rehabilitation.		Where is Randolph? It's hard to tell.	Attention to scheme aids unity, improves image of town. Illumination = needed. SIGNS STOP TRANSIENTS, PUT NEW VISITORS AT EASE!	Thematic plan in keeping with marketing need to differentiate the town as a merchandising/leisure center. Destination shopping/visiting occurs.
Estimated Cost	Variable, but estimated at $5,000 average. Maximum initial loan= $7500. Rates lower for owner-matched borrowing? Rates below market. Expect leveraging of 1:3.		$4,000?	Variable.	Open-ended.
Benefits	Bank commitment to downtown @ low risk. Owners motivated to invest. First step to new look downtown. Mechanism already in place.		Lower cost & inducement to upgrade.	To give downtown a focus - an entry and an exit.	Destination shopping/visits occur. Visits are longer. Consumer traffic concentrated --> cumulative attraction of customers. Utilization of more downtown space.
Schedule	Summer 86 FF.		Immediate.	Spring 1987.	1988.

PHYSICAL ENVIRONMENT

	HISTORIC PRESERVATION	BOATING FACILITIES	WISH LIST OF SMALL ITEMS
on Program Description	Apply for historic registry status for all possible buildings in town. Inventory of such buildings already in CDBG report.	Develop town access to river.	Traffic will slow if there's something to slow for. Remove yellow paint from curbing; restore curbing where gone. Cross-walk with pedestrian light.
Financial Resources		Trade land? Permit fees.	
ation. on Administration Information Resources	Me Historic Preservation Office Main Street Center -- Nat'l Trust for Historic Preservation -- 202-673-4000 Natl Trust (NEng) -- 617-223-7754	Harbormaster. Cardiner. State.	
Marketing Value	A catalyst for further restoration & investment by businesses. Fulfills public demand for preservation. Enhances image of town.	Pivotal in the reorientation of attention to the river.	
Estimated Cost	Minimal. Photographs, maps & legwork already done!	State provision.	
Benefits	Beautification. Some tax benefits. If in flood area, not subject to constraints of regulations. Preserve what's left.	Boaters.	
Schedule	Immediate	A S A P	

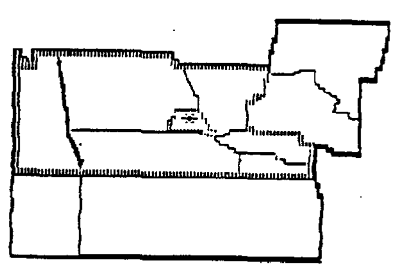
GROWTH ENVIRONMENT

	ZONING	RESTAURANT	GARDEN MKT	BUSINESS MIX
Program Description	Codify and clarify current ordinances.	Restaurant development is an excellent aid to more consumer traffic & demand is definitely there.	Vendors with carts & awnings can cater to the transient & recreational populace. They can fill a void which cant be filled by new buldings due to flood plain. Garden market ---> atmosphere.	Convenience & some specialty. Encourage focus on river for recreational & leisure economy, enhance convenience/ shopper use via upgraded environment.
Financial Resources	Time.	PRIVATE INVESTMENT		
Administration. Information Resources	Planning board. Other models. State planning.			Randolph can't compete w shopping centers, must differentiate its mkt. Demand for daily needs is high; location as convenience ctr is excellent.
Marketing Value	Will ease the entry of new investors into town. Current mix and presentation is discouraging for anyone looking at prospects for Randolph.			
Estimated Cost	None.			
Benefits	Better reception by possible investors.			Year-rounder use of town stores. Allows fresh $$ to come to town.

SURVEYS

&

COMMENTS



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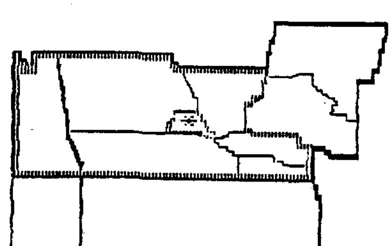
SHOPPERS

RANDOLPH



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S H O P P E R' S / V I S I T O R   S U R V E Y

Randolph Survey Document
==

1. First, do you live here? 1[99%] year-round
   2[1%] part of the year
   3[0%] visiting area

2. Where did you come from today?

1[43%]	Randolph	4[1%]	Farmington
2[4%]	Augusta	5[23%]	Pittston
3[7%]	Gardiner	6[21%]	Other

3. Do you come here:

1[44%]	Daily	4[1%]	Monthly
2[46%]	Weekly	5[0%]	Less than Monthly
3[2%]	Once/Mo.+	6[6%]	By chance

4. What is the chief reason you are here today?

1[72%]	Shop	4[5%]	Services
2[0%]	Restaurant	5[0%]	Sightsee
3[7%]	Work	6[16%]	Other

5. If you are here to shop or visit, why did you come here?

1[78%]	Convenient	5[0%]	No trans. elsewhere
2[1%]	Best Prices	6[1%]	Wide selection goods
3[0%]	Easy Parking	7[19%]	Other
4[0%]	A sale		

6. What town do you go to most for the following goods and services?

WEEKLY FOOD

1[11%]	Randolph	5[0%]	Pittston
2[16%]	Augusta	6[4%]	Other
3[56%]	Gardiner	7[2%]	Augusta and Gardiner
4[0%]	Farmington	8[11%]	Combination

HOUSEHOLD NEEDS

1[14%]	Randolph	5[0%]	Pittston
2[28%]	Augusta	6[3%]	Other
3[49%]	Gardiner	7[3%]	Augusta and Gardiner
4[0%]	Farmington	8[9%]	Combination

ENTERTAINMENT

1[5%]	Randolph	5[4%]	Pittston
2[43%]	Augusta	6[11%]	Other
3[19%]	Gardiner	7[3%]	Augusta and Gardiner
4[0%]	Farmington	8[4%]	Combination

DINING

1[3%]	Randolph	5[3%]	Pittston
2[43%]	Augusta	6[12%]	Other
3[22%]	Gardiner	7[14%]	Augusta and Gardiner
4[0%]	Farmington	8[3%]	Combination

CLOTHING

1[0%]	Randolph	5[1%]	Pittston
2[61%]	Augusta	6[13%]	Other
3[13%]	Gardiner	7[9%]	Augusta and Gardiner
4[0%]	Farmington	8[4%]	Combination

AUTO PARTS/REPAIRS

1[12%]	Randolph	5[1%]	Pittston
2[40%]	Augusta	6[5%]	Other
3[36%]	Gardiner	7[3%]	Augusta and Gardiner
4[3%]	Farmington	8[0%]	Combination

HEALTH/LEGAL

1[0%]	Randolph	5[0%]	Pittston
2[53%]	Augusta	6[12%]	Other
3[29%]	Gardiner	7[4%]	Augusta and Gardiner
4[0%]	Farmington	8[3%]	Combination

LAUNDRY/DRY CLEANING

1[58%]	Randolph	5[3%]	Pittston
2[10%]	Augusta	6[6%]	Other
3[17%]	Gardiner	7[0%]	Augusta and Gardiner
4[1%]	Farmington	8[4%]	Combination

BANKING

1[0%]	Randolph	5[0%]	Pittston
2[24%]	Augusta	6[4%]	Other
3[59%]	Gardiner	7[8%]	Augusta and Gardiner
4[0%]	Farmington	8[3%]	Combination

CONVENIENCE ITEMS

1[54%]	Randolph	5[1%]	Pittston
2[12%]	Augusta	6[6%]	Other
3[17%]	Gardiner	7[1%]	Augusta and Gardiner
4[0%]	Farmington	8[9%]	Combination

RECREATION

1[13%]	Randolph	5[4%]	Pittston
2[38%]	Augusta	6[23%]	Other
3[17%]	Gardiner	7[0%]	Augusta and Gardiner
4[1%]	Farmington	8[3%]	Combination

HOME HEAT FUEL

1[36%]	Randolph	5[3%]	Pittston
2[16%]	Augusta	6[10%]	Other
3[31%]	Gardiner	7[0%]	Augusta and Gardiner
4[0%]	Farmington	8[3%]	Combination

BARBER/HAIRDRESSER

1[6%]	Randolph	5[3%]	Pittston
2[35%]	Augusta	6[14%]	Other
3[36%]	Gardiner	7[0%]	Augusta and Gardiner
4[5%]	Farmington	8[0%]	Combination

8. What is your primary source of information about sales and specials offered by local businesses?

1[38%]	newspaper	4[3%]	window displays
2[3%]	radio	5[1%]	television
3[54%]	circulars	6[1%]	other

9. Are there goods or services available in Randolph which you buy elsewhere because of price or convenience?
1[37%] Yes 2[63%] No
(See Comments, attached)

10. Speaking of the downtown village, what do you think is its greatest asset?
1[72%] Answered 2[28%] Didn't Answer
(See Comments, attached)

11. What do you think would bring more business and more visitors here?
1[85%] Answered 2[15%] Didn't Answer
(See Comments, attached)

12. How important do you consider the following in making Randolph a nicer place to shop or visit?

MORE LANDSCAPING
1[26%] Very Important 4[6%] Unimportant
2[32%] Important 5[12%] Don't Know
3[23%] Somewhat Important

NICE SIDEWALKS & CURBS
1[37%] Very Important 4[5%] Unimportant
2[32%] Important 5[1%] Don't Know
3[25%] Somewhat Important

HISTORIC PRESERVATION OF BUILDINGS
1[15%] Very Important 4[22%] Unimportant
2[36%] Important 5[5%] Don't Know
3[22%] Somewhat Important

OFF-STREET PARKING
1[30%] Very Important 4[17%] Unimportant
2[40%] Important 5[2%] Don't Know
3[11%] Somewhat Important

SIGN IMPROVEMENT/DESIGN
1[23%] Very Important 4[16%] Unimportant
2[33%] Important 5[2%] Don't Know
3[26%] Somewhat Important

MORE PARKS / RECREATIONAL FACILITIES
1[42%] Very Important 4[7%] Unimportant
2[36%] Important 5[5%] Don't Know
3[10%] Somewhat Important

MORE INFORMATION ABOUT WHAT'S HAPPENING DOWNTOWN
1[17%] Very Important 4[17%] Unimportant
2[46%] Important 5[5%] Don't Know
3[15%] Somewhat Important

A VISITOR INFORMATION CENTER
1[11%] Very Important 4[26%] Unimportant
2[28%] Important 5[2%] Don't Know
3[22%] Somewhat Important

PEDESTRIAN CONVENIENCES SUCH AS BENCHES OR TRASH BINS
1[25%] Very Important 4[14%] Unimportant
2[42%] Important 5[5%] Don't Know
3[15%] Somewhat Important

A GREATER VARIETY OF SHOPS AND STORES
1[56%] Very Important 4[9%] Unimportant
2[31%] Important 5[1%] Don't Know
3[4%] Somewhat Important

MORE SOCIAL FUNCTIONS AND EVENTS
1[57%] Very Important 4[10%] Unimportant
2[21%] Important 5[2%] Don't Know
3[10%] Somewhat Important

A RESTAURANT
1[41%] Very Important 4[6%] Unimportant
2[42%] Important 5[2%] Don't Know
3[9%] Somewhat Important

13. What new business would you like to see in Randolph?
1[79%] Answered 2[21%] Didn't Answer
(See Comments attached)

14. How long have you lived in or been coming to this area?
1[3%] Under 1 year 4[13%] 10 to 14 years
2[3%] 1 to 4 years 5[16%] 15 to 19 years
3[13%] 5 to 9 years 6[53%] 20 years +

15. Would you mind telling me your age?
1[12%] To 25 years 4[18%] 45 to 54 years
2[39%] 25 to 34 years 5[9%] 55 to 64 years
3[16%] 35 to 44 years 6[6%] 65 years +

16. The attached card lists very broad income ranges. Could you circle the letter which best matches your total yearly household income?
1[21%] Under $10,000 4[16%] 20,001-30,000
2[23%] 10,001-15,000 5[16%] Over $30,000
3[23%] 15,001-20,000

17. How many people are there in your household?
1[15%] One 4[31%] Four
2[35%] Two 5[1%] Five
3[11%] Three 6[10%] Six +

18. Are you:
1[54%] Male 2[46%] Female

===

S H O P P E R' S / V I S I T O R   S U R V E Y

C O M M E N T S   O F   R A N D O L P H
S H O P P E R S

===

In response to Question #4, "What is the chief reason you are here today?", the following responses were given in the category of "Other": (These are listed in order of their frequency)

Megabucks
Laundry
Quick stops
Policy

In response to Question #5, "If you are here to shop or visit, why did you come here?", the following responses to "Other" are listed in order of their frequency:

Megabucks
Laundry
Work
MENTIONED ONCE:
Friendly atmosphere
Like the meats
Good pizza
IGA (service)
Cash check

In response to Question #9, "Are there goods or services available in Randolph which you buy elsehwhere because of price or convenience?", the following were mentioned:

PRICE	CONVENIENCE
Food	Food
Auto	Gas
Gas	Building Materials
Building Materials	Clothes
Clothes	Oil
Household	Banking
Heating	Drug Store

Question #10, "Speaking of the downtown village, what do you think is its greatest asset?":

No traffic
Convenient
Quiet
Spirit of the People
Waterfront
Goggins

Well-traveled highway
Marina
Laundry
Sunoco
The school and summer recreation

Question #11, "What do you think would bring more business and more visitors here?":

Bank
Barber Shop
More stores
More publisizing
Movie Theatre
Docking Facilities
Restaurant
Improved appearance
Drug Store
Entertainment
Shopping mall
Factory
Lower taxes
Improved waterfront
Hardware Store
Liquor store
Recreation

Question #13, "What new business would you like to see in Randolph?":

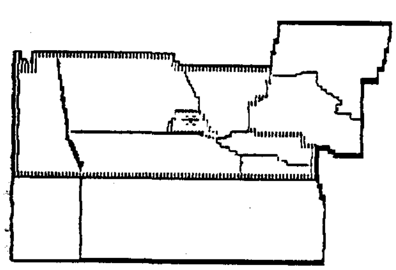
Bank
Zayres
Night clubs
More Stores
Recreation and parks
Restaurant
Movie Theatre
Shopping Mall
Plumbing and Heating
Machine Shop
Clothing stores
Thrift shop
Arcardes
Bakery
Drug Store
Sporting Goods Store
Fabric Store
Craft Store

Fitness Center
Boat Landing
Barber Shop
Dry goods store
Jail
Burger King
Factory
Nature Center
Auto stores
Bar and grille

B

SHOPPERS

Augusta ◦ Gardiner



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S H O P P E R ' S / V I S I T O R   S U R V E Y

Non-Randolph Survey Document

==

1. First, do you live here?
   - 1[93%] year-round
   - 2[2%] part of the year
   - 3[5%] visiting area

2. Where did you come from today?

1[5%]	Randolph	4[2%]	Farmington
2[18%]	Augusta	5[4%]	Pittston
3[34%]	Gardiner	6[37%]	Other

3. Do you come here:

1[22%]	Daily	4[4%]	Monthly
2[54%]	Weekly	5[4%]	Less than Monthly
3[11%]	Once/Mo.+	6[4%]	By chance

4. What is the chief reason you are here today?

1[80%]	Shop	4[3%]	Services
2[1%]	Restaurant	5[1%]	Sightsee
3[8%]	Work	6[7%]	Other

5. If you are here to shop or visit, why did you come here?

1[65%]	Convenient	5[1%]	No trans. elsewhere
2[7%]	Best Prices	6[5%]	Wide selection goods
3[0%]	Easy Parking	7[18%]	Other
4[4%]	A sale		

6. What town do you go to most for the following goods and services?

WEEKLY FOOD

1[1%]	Randolph	5[0%]	Pittston
2[35%]	Augusta	6[11%]	Other
3[49%]	Gardiner	7[4%]	Augusta and Gardiner
4[0%]	Farmington	8[1%]	Combination

HOUSEHOLD NEEDS

1[1%]	Randolph	5[0%]	Pittston
2[42%]	Augusta	6[12%]	Other
3[41%]	Gardiner	7[4%]	Augusta and Gardiner
4[0%]	Farmington	8[0%]	Combination

ENTERTAINMENT

1[1%]	Randolph	5[0%]	Pittston
2[55%]	Augusta	6[18%]	Other
3[17%]	Gardiner	7[9%]	Augusta and Gardiner
4[0%]	Farmington	8[1%]	Combination

DINING

1[1%]	Randolph	5[0%]	Pittston
2[52%]	Augusta	6[17%]	Other
3[17%]	Gardiner	7[10%]	Augusta and Gardiner
4[0%]	Farmington	8[3%]	Combination

CLOTHING
1[1%] Randolph
2[60%] Augusta
3[15%] Gardiner
4[0%] Farmington
5[0%] Pittston
6[16%] Other
7[6%] Augusta and Gardiner
8[2%] Combination

AUTO PARTS/REPAIRS
1[4%] Randolph
2[50%] Augusta
3[24%] Gardiner
4[0%] Farmington
5[0%] Pittston
6[14%] Other
7[4%] Augusta and Gardiner
8[4%] Combination

HEALTH/LEGAL
1[1%] Randolph
2[47%] Augusta
3[31%] Gardiner
4[0%] Farmington
5[0%] Pittston
6[18%] Other
7[3%] Augusta and Gardiner
8[1%] Combination

LAUNDRY/DRY CLEANING
1[5%] Randolph
2[31%] Augusta
3[42%] Gardiner
4[1%] Farmington
5[1%] Pittston
6[19%] Other
7[1%] Augusta and Gardiner
8[0%] Combination

BANKING
1[1%] Randolph
2[40%] Augusta
3[44%] Gardiner
4[0%] Farmington
5[0%] Pittston
6[12%] Other
7[2%] Augusta and Gardiner
8[1%] Combination

CONVENIENCE ITEMS
1[1%] Randolph
2[36%] Augusta
3[40%] Gardiner
4[0%] Farmington
5[1%] Pittston
6[17%] Other
7[2%] Augusta and Gardiner
8[3%] Combination

RECREATION
1[1%] Randolph
2[46%] Augusta
3[20%] Gardiner
4[0%] Farmington
5[1%] Pittston
6[22%] Other
7[7%] Augusta and Gardiner
8[1%] Combination

HOME HEAT FUEL
1[4%] Randolph
2[36%] Augusta
3[33%] Gardiner
4[0%] Farmington
5[1%] Pittston
6[25%] Other
7[1%] Augusta and Gardiner
8[0%] Combination

BARBER/HAIRDRESSER
1[1%] Randolph
2[48%] Augusta
3[30%] Gardiner
4[1%] Farmington
5[1%] Pittston
6[18%] Other
7[1%] Augusta and Gardiner
8[0%] Combination

8. What is your primary source of information about sales and specials offered by local businesses?
1[38%] newspaper
2[1%] radio
3[56%] circulars
4[1%] window displays
5[2%] television
6[2%] other

9. Do you ever spend time in downtown Randolph?
   1[45%] Yes 2[55%] No
   (See Comments, attached)

10. If you know the town of Randolph, what do you think is its greatest asset and its greatest deficit?
   1[58%] Answered 2[42%] Didn't Answer
   (See Comments for specific assets and deficits)

11. What do you think would bring more business and more visitors to Randolph?
   1[69%] Answered 2[31%] Didn't Answer
   (See Comments, attached)

12. How important do you consider the following in making Randolph a nicer place to shop or visit?

MORE LANDSCAPING
1[16%] Very Important 4[11%] Unimportant
2[37%] Important 5[17%] Don't Know
3[19%] Somewhat Important

NICE SIDEWALKS & CURBS
1[19%] Very Important 4[4%] Unimportant
2[45%] Important 5[16%] Don't Know
3[16%] Somewhat Important

HISTORIC PRESERVATION OF BUILDINGS
1[16%] Very Important 4[10%] Unimportant
2[32%] Important 5[16%] Don't Know
3[26%] Somewhat Important

OFF-STREET PARKING
1[28%] Very Important 4[6%] Unimportant
2[40%] Important 5[15%] Don't Know
3[11%] Somewhat Important

SIGN IMPROVEMENT/DESIGN
1[9%] Very Important 4[19%] Unimportant
2[35%] Important 5[16%] Don't Know
3[22%] Somewhat Important

MORE PARKS 7 RECREATIONAL FACILITIES
1[28%] Very Important 4[8%] Unimportant
2[33%] Important 5[13%] Don't Know
3[18%] Somewhat Important

MORE INFORMATION ABOUT WHAT'S HAPPENING DOWNTOWN
1[15%] Very Important 4[8%] Unimportant
2[36%] Important 5[15%] Don't Know
3[25%] Somewhat Important

A VISITOR INFORMATION CENTER
1[11%] Very Important 4[24%] Unimportant
2[25%] Important 5[21%] Don't Know
3[19%] Somewhat Important

PEDESTRIAN CONVENIENCES SUCH AS BENCHES OR TRASH BINS
1[17%] Very Important 4[9%] Unimportant
2[40%] Important 5[15%] Don't Know
3[19%] Somewhat Important

A GREATER VARIETY OF SHOPS AND STORES

1[64%]	Very Important	4[1%]	Unimportant
2[21%]	Important	5[13%]	Don't Know
3[2%]	Somewhat Important		

MORE SOCIAL FUNCTIONS AND EVENTS

1[40%]	Very Important	4[4%]	Unimportant
2[28%]	Important	5[16%]	Don't Know
3[12%]	Somewhat Important		

A RESTAURANT

1[50%]	Very Important	4[5%]	Unimportant
2[25%]	Important	5[14%]	Don't Know
3[6%]	Somewhat Important		

13. What do you think is lacking in this area's shopping or recreation offerings?

1[69%]	Answered	2[31%]	Didn't Answer

(See Comments attached)

14. How long have you lived in or been coming to this area?

1[4%]	Under 1 year	4[19%]	10 to 14 years
2[13%]	1 to 4 years	5[11%]	15 to 19 years
3[11%]	5 to 9 years	6[42%]	20 years +

15. Would you mind telling me your age?

1[21%]	To 25 years	4[13%]	45 to 54 years
2[19%]	25 to 34 years	5[14%]	55 to 64 years
3[21%]	35 to 44 years	6[12%]	65 years +

16. The attached card lists very broad income ranges. Could you circle the letter which best matches your total yearly household income?

1[29%]	Under $10,000	4[19%]	20,001-30,000
2[20%]	10,001-15,000	5[12%]	Over $30,000
3[21%]	15,001-20,000		

17. How many people are there in your household?

1[11%]	One	4[13%]	Four
2[31%]	Two	5[14%]	Five
3[25%]	Three	6[6%]	Six +

18. Are you:

1[43%]	Male	2[57%]	Female

19. These surveys were taken in:

2[46%]	Augusta	3[54%]	Gardiner

==

N O N - R A N D O L P H   S H O P P E R S

C O M M E N T S

==

Question #8 - source of information, "Circular" received 55.84% of the responses and, specifically, the K.J. Flyer was mentioned.

In response to Question #9, "Do you ever visit or spend time in downtown Randolph?", those who said "yes" did so for the following reasons (in order of frequency):

Visit friends and relatives (2-to-1 over IGA)
IGA
Randolph Sunoco
Drive through
Hardware Store
MENTIONED ONCE:
Strawberries
Laundry
Work
Restaurant

Those who resonded "no" had the following comments:

There's nothing there
What for?
Too far
Out of the way
No transportation
Ghost town
Nothing there except Shep's garage
Don't know where it is

The following is a list of responses given as Randolph's greatest asset, Question #10:

River
Quiet
Marina
Laundry
Sunoco
Fire Station
Proximity to Augusta
Main Street
Not crowded
The people
Atmosphere
IGA

Pretty
Next to Gardiner
Brownies
Church
Good little town
Rts 27 and 226
Colony Ice Cream

The following is a list of things listed as Randolph's deficits, Question 10:

Nothing There
School
Small size
Location
Could be cleaner
Fire Department
Lack of shopping
Run-down buildings
Not enough businesses
No Industry
No entertainment/Restaurant
It's a flood plain
It's too crowded
No advertising
Tax base
Bad reputation

In response to Question #11, "What do you think would bring more business and more visitors to Randolph?", we received the following representative answers:

More stores
A shopping mall
A movie theatre
More advertising
Docking facilities
A nice restaurant
More recreation
A face lift
Variety of stores
Drug store
More businesses

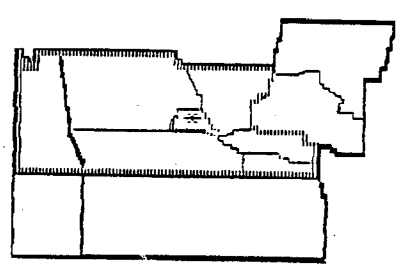
Fix up the waterfront
Traffic control
Better prices
Industry
Marina
Jobs
Anything
Disneyworld
More entertainment
Better use of the buildings
Playground or park
Tax breaks or incentives
Stop the flooding
Leading stores
Use the river more

In response to the Question #13, "What do you think is lacking in this area's shopping or recreation offerings?", the following is a list of representative answers:

Night clubs
Recreation/parks
A restaurant
Movie theatre
Clothing stores
Shopping Mall
Bakery
Specialty shops
Drug store
Boat landing
Bar and grill
Burger King
Department store
Hardward store
MacDonalds
Lumber yard

C

PROPERTY OWNERS



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S U M M A R Y   S U R V E Y   O F   R A N D O L P H

P R O P E R T Y   O W N E R S

==

1. *Where is this property located?*
   1[100%] Randolph
   (See Questionnaires for exact locations)

2. *What is the current use of this property?*

1[14%]	Commercial	4[0%]	Residence-unoccupied
2[10%]	Residence-rented	5[14%]	Vacant
3[59%]	Residence-owner occupied	6[3%]	Other

   If this is a residence, is it:

1[64%]	Single fam. res.	4[4%]	Other
2[4%]	Multi-fam.res.	5[29%]	Not applicable
3[0%]	Mobile home		

3. *Is it used:*

1[89%]	Year-round	3[0%]	Combination
2[0%]	Seasonally	4[11%]	Not applicable

4. *Do you rent this property to others for commercial purposes?*
   1[7%] Yes   2[93%] No

5. *How many years have you owned this property?*

1[4%]	To 1 year	4[16%]	10 to 14 years
2[24%]	1 to 4 years	5[0%]	15 to 19 years
3[12%]	5 to 9 years	6[44%]	20 years +

6. *What type of structure is on this property?*

1[79%]	Wood	4[0%]	Metal/steel
2[7%]	Brick	5[10%]	Not applicable
3[3%]	Stone	6[0%1	Other

7. *What is the building's age in years?*

1[8%]	to 10 years	4[37%]	50 to 99 years
2[0%]	10 to 24 years	5[33%]	100 to 199 years
3[17%]	25 to 49 years	6[4%]	200 years +

8. *Is the building winterized*
   1[79%] Yes   2[10%] No   3[10%] No building

   Is there a basement
   1[79%] Yes   2[8%] No   3[12%] No building

How many stories?

1[26%]	One	4[4%]	Four
2[56%]	Two	5[0%]	Five
3[4%]	Three	6[11%]	No building

Do you live in Randolph:

1[93%]	Full-time	3[7%]	No
2[0%]	Part-time		

9. What do you think is the Randolph Downtown/Riverfront district's greatest asset when it comes to business success?
   1[59%] Answered 2[41%] Didn't Answer
   (See Comments)

10. What do you think would contribute to a better downtown economy?
   1[55%] Answered 2[45%] Didn't Answer
   (See Comments)

11. Have you made any changes, improvements or renovations of this property in the last four years?

1[76%]	No	5[0%]	Sell
2[24%]	Improve/remodel	6[0%]	Build
3[0%]	Change use/move	7[0%]	Other
4[0%]	Rent		

How much did you spend?

1[50%]	to $999	5[0%]	$25,000 to $49,999
2[50%]	$1,000 to $4,999	6[0%]	$50,000 to $99,999
3[0%]	$5,000 to $9,999	7[0%]	$$100,000 +
4[0%]	$10,000 to $24,999		

12. Do you plan any changes, improvements or renovations of this property in:
   THE NEXT 12 MONTHS (1986)
   1[26%] Yes 2[74%] No

   THE NEXT 2 - 3 YEARS (1987-98)
   1[17%] Yes 2[83%] No

   If so, what specifically are your plans?
   1[35%] Answered 2[65%] Didn't Answer
   (See Questionnaires for specifics)

If expenditures are involved, how much do you plan to spend?

1[14%] to $999
2[43%] $1,000 to $4,999
3[14%] $5,000 to $9,999
4[0%] $10,000 to $24,999
5[0%] $25,000 to $49,999
6[0%] $50,000 to $99,999
7[29%] $$100,000 +

13. What single one of the following do you think would be most useful to the Randolph economy in helping it grow?
    1[5%] Low interest loans
    2[0%] Tax incentives
    3[53%] Development of a planned Randolph shopping/commercial district
    4[21%] Increased recreational use of the riverfront
    5[5%] Business planning/investment advice
    6[11%] Downtown marketing effort
    7[5%] Other

14. What specific changes or improvements would you forsee for your property if the town's economy grew?
    1[33%] Answered 2[67%] Didn't Answer
    (See Comments)

15. If you were to rank the importance of the following for downtown Randolph's economic future, what would you rank it:

ENHANCED LANDSCAPING
1[17%] Very important
2[21%] Important
3[29%] Somewhat Important
4[21%] Unimportant
5[12%] Don't Know

SIDEWALK/CURB IMPROVEMENT
1[16%] Very important
2[40%] Important
3[20%] Somewhat Important
4[12%] Unimportant
5[12%] Don't Know

HOUSING REHABILITATION
1[33%] Very important
2[29%] Important
3[12%] Somewhat Important
4[17%] Unimportant
5[8%] Don't Know

OFF-STREET PARKING
1[18%] Very important
2[14%] Important
3[23%] Somewhat Important
4[41%] Unimportant
5[5%] Don't Know

SIGN IMPROVEMENT/DESIGN
1[13%] Very important
2[39%] Important
3[4%] Somewhat Important
4[30%] Unimportant
5[13%] Don't Know

PARK/RECREATION ADDITIONS
1[27%] Very important 4[9%] Unimportant
2[41%] Important 5[5%] Don't Know
3[18%] Somewhat Important

LOCAL PROMOTIONAL PLAN
1[12%] Very important 4[25%] Unimportant
2[38%] Important 5[4%] Don't Know
3[21%] Somewhat Important

VISITOR INFORMATION CENTER
1[4%] Very important 4[48%] Unimportant
2[9%] Important 5[9%] Don't Know
3[30%] Somewhat Important

PEDESTRIAN AMENITIES (BENCHES, TRASH BINS)
1[8%] Very important 4[12%] Unimportant
2[25%] Important 5[4%] Don't Know
3[50%] Somewhat Important

REDUCED SPEED LIMITS
1[36%] Very important 4[20%] Unimportant
2[28%] Important 5[4%] Don't Know
3[12%] Somewhat Important

CREATE HISTORIC DISTRICT
1[4%] Very important 4[37%] Unimportant
2[21%] Important 5[9%] Don't Know
3[29%] Somewhat Important

RESIDENT POPULATION GROWTH
1[14%] Very important 4[32%] Unimportant
2[27%] Important 5[14%] Don't Know
3[14%] Somewhat Important

RIVERFRONT IMPROVEMENT
1[48%] Very important 4[9%] Unimportant
2[26%] Important 5[4%] Don't Know
3[13%] Somewhat Important

RANDOLPH PROPERTY OWNERS COMMENTS

The following are the responses of the Randolph property owners:

To the question, "What do you think is the Randolph Downtown/River-front district's greatest asset when it comes to business success?", we received the following answers:

Location of business, easy to walk and/or commute.

High volume of traffic across the bridge from Gardiner.

The River.

Easy access from all sections.

To the question,"What do you think would contribute to a better downtown economy?", we received the following answers:

Commercial development.

Small shopping area and more stores.

A drug store, car wash, beauty parlor in Randolph.

Public access to River. A restaurant, more stores.

Prices should be more competitive with Gardiner. Randolph prices are higher.

Presently there is nothing to entice anyone to go downtown.

More variety of stores and a sit-down eating establishment.

Dress up Randolph; a nice restaurant, park, upgrade buildings in town center. There are many good houses on main road. Maximize attractiveness.

A middle-class condominium on the river.

A motel.

Flood protection.

Clean up the old buildings and the shoreline. Use the vacant buildings.

Question #12, specific plans for changes or improvements:

Cellar floor work, chimmney repair, insulation; passive and active solar heat

Paint and paper - update.

New roof shingles, painting, shrubs.

Complete remodeling of building - to be used as a supermarket.

Repairs and redecorating.

Office space and add second floor for apartments.

Repave driveway - plant fruit trees.

The following are responses to the question, "What specific changes or improvements would you forsee for your property if the town's economy grew?":

Potential use - such as a restaurant with a balcony overlooking the river.

My property should be more valuable. I always thought this was a great area for a shopping mall and cinema center.

Increased property value - increased business.

General Suggestions:

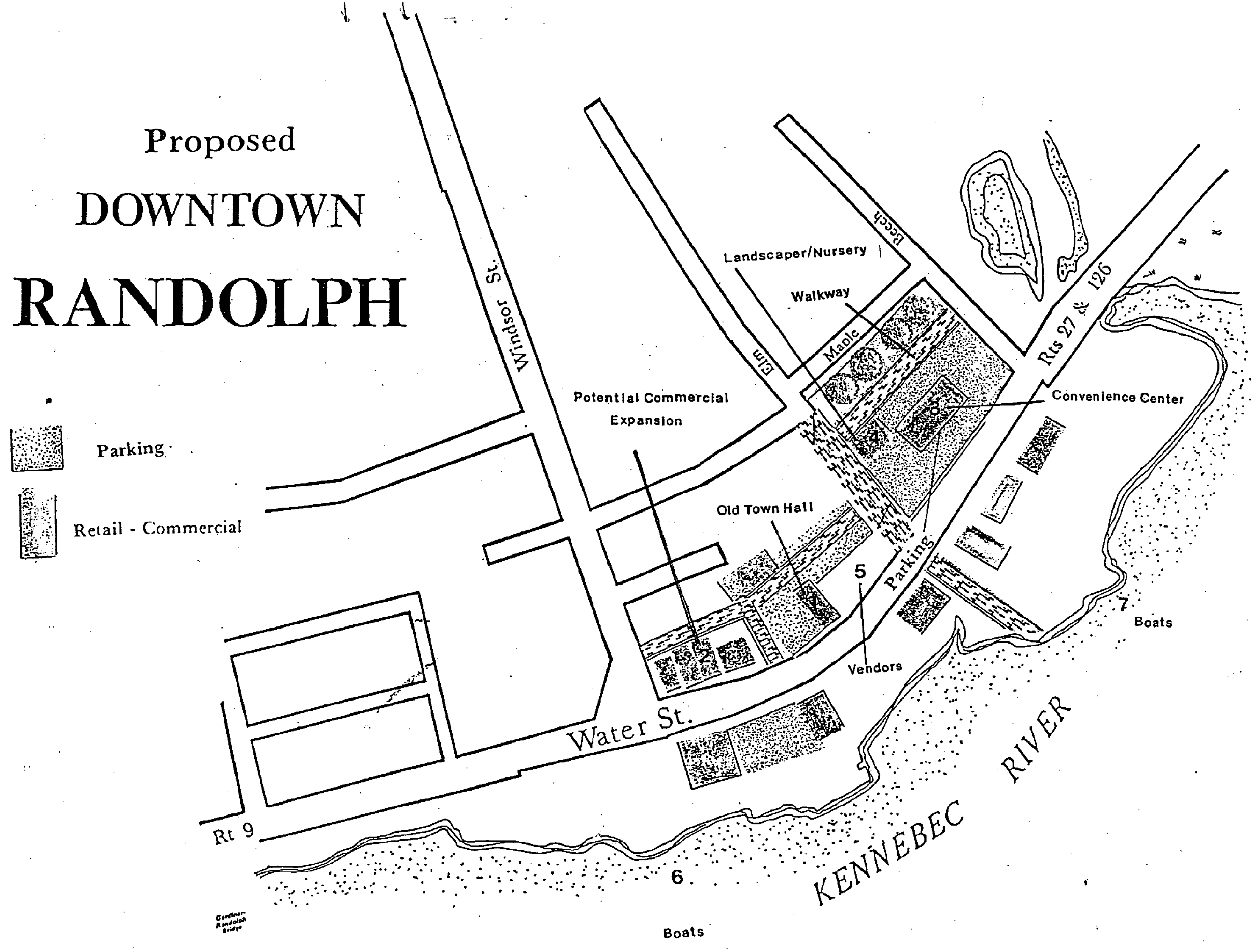
Reduce speed limits. Traffic speed by this property is unbearable. Noise.

Houses and lots need to be renumbered. We have 3 - six water St., 3 - 24 water and 3 - 22 Water, etc. Very confusing for deliveries.

Zoning to keep residential area intact - also no large business signs in area of homes.

Take out the old garage adjacent to the bridge so that cemetary, school and better approach can be seen. Put an attractive "Welcome to Randolph" sign on the empty lot as you arrive from Gardiner Bridge. Surround it with extravagant display of shrubs and flowers.

Proposed DOWNTOWN RANDOLPH



DEPARTMENT OF THE ARMY
NEW ENGLAND DIVISION, CORPS OF ENGINEERS
424 TRAPELO ROAD
WALTHAM, MASSACHUSETTS 02254-9149

10/28/86

October 16, 1986

REPLY TO ATTENTION OF
Planning Division
Plan Formulation Branch

Mr. Norman P. Whitzell
First Selectman
Town of Randolph
128 Water Street
Randolph, Maine 04345

Dear Mr. Whitzell:

This will report our findings resulting from reconnaissance scope investigations of flooding conditions along the Kennebec River in Randolph. Engineers of my staff met with you and other local officials to inspect the problem area on March 4, 1986. Our investigations established that the flood problem along the Kennebec River is not eligible for Federal assistance under the special continuing authority contained in Section 205 of the 1948 Flood Control Act.

The Section 205 authority allows the Corps of Engineers to construct small flood control projects which are complete-within-themselves and economically justified. The Corps is required to show that there is a Federal interest in a project, based on significant economic justification for the expenditure of Federal funds. Our evaluation concluded that sustained flood damages do not economically justify a relocation project. Therefore, we cannot proceed further with a Section 205 study.

Enclosed is a report of observations made during our field investigation and subsequent office research. This information may be useful should the town decide to pursue flood control improvements for this area in the future.

If you have any questions regarding this response, please contact me at (617) 647-8222. Mr. Robert Martin of my staff coordinated this investigation. He may be reached at (617) 647-8398.

Sincerely,

Thomas A. Rhen
Colonel, Corps of Engineers
Division Engineer

Enclosure

Copy Furnished:

Mr. Fred Michaud
State Planning Office
State House Station 130
Augusta, Maine 04333

INITIAL APPRAISAL REPORT
KENNEBEC RIVER
RANDOLPH, MAINE

OCTOBER 1986

1. AUTHORIZATION

Initial appraisal studies have been accomplished under authority contained in Section 205 of the 1948 Flood Control Act, as amended. Federal assistance to determine the need and feasibility of providing flood damage reduction measures was requested on 16 December 1985 by the Board of Selectmen of Randolph, Maine (see Enclosure 1).

The scope of this initial appraisal study was to determine if Federal involvement is warranted based on preliminary planning analyses involving engineering merit and benefit-cost evaluations to determine economic feasibility.

2. STUDY AREA

Randolph is primarily a residential community located in southern Maine, approximately 7 miles south of Augusta, Maine and approximately 36 miles inland from the Atlantic Ocean.

The study area (see Plate 1) involves a concentration of Randolph businesses which are presently located along Water Street (State Route 9/27) starting from the vicinity of the Randolph-Gardiner bridge and extending approximately 1,500 feet downstream. The Kennebec River flows southerly through Randolph and parallels Water Street on its west side. It is the source of flooding occurrence affecting both residential and commercial properties along Water Street.

3. PROBLEM IDENTIFICATION

Hydrology

A Flood Insurance Study of the Kennebec River in Randolph, Maine was completed in March 1979 by the U.S. Geological Survey for the Federal Insurance Administration. Information from the report, plus published 1936 high water data, was used to develop a stage-frequency curve (see Plate 2) for the area along the Kennebec River in Randolph, Maine (1,000± feet downstream of the Randolph-Gardiner bridge).

Flood History

Reportedly there has been a long history of flooding on the Kennebec River in the town of Randolph. Although tide levels affect river stages in this area, it was the consensus of local officials and the Corps of Engineers that the tidal effect on flooding is minor. A U.S. Geological Survey gaging station is located 15 miles upstream from Randolph, in North Sydney, and measures flows from a 5,403-square mile drainage area. The greatest known flood on the lower Kennebec River occurred in March 1936 when the river at Randolph crested about 25 feet above normal. This flood event had a frequency of occurrence of approximately a 1.3 percent annually (75-year). More recent floods occurred in December 1973, April 1979, April 1983 and May/June 1984. The most recent flood reported by Randolph town officials was in January 1986, which disrupted traffic on State Route 9/27 (Water Street) and affected some commercial and residential properties. All of these more recent events had a frequency of occurrence of less than 10 percent annually (10-year).

4. DAMAGE ASSESSMENT

Nature of Flood Plain Activities

The Kennebec River floodplain through Randolph affects commercial and residential properties located along Water Street and includes the town offices/fire station property.

Properties subject to flooding include a supermarket, gas station, laundromat, marina, fast food stand, two warehouse facilities, eleven single and multiple unit residential properties, including seven mobile homes and a building housing the town offices/fire station. Most of the properties are located along either side of Water Street with the mobile homes located immediately off Water Street.

Recurring Flood Losses

A preliminary flood damage survey was conducted in May 1986 to determine flood damage losses (physical and non-physical) to occupants of the study area at different stages of the Kennebec River. Recurring losses are those potential flood damages which are expected to occur at different flood stages. The stage-frequency relation developed for the Randolph study area and stage-damage data developed from field survey were related to arrive at a damage-frequency relationship for flood events with frequencies of occurrence from a 10 percent annual chance flood event (10-year) to a 0.2 percent annual chance flood event (500-year). Table 1 shows estimated recurring flood losses for these range of events. Table 1 also shows the number of buildings affected by first floor flooding in the event of occurrence of the respective flood.

TABLE 1
Kennebec River, Randolph, Maine
Relationship Between Frequencies of Flood Events
and Flood Losses and Buildings Receiving Flooding

Probable Frequency of Flood Event	Elevation of Flood Event (feet NGVD)	Recurring Flood Losses ($000)	# of Buildings Receiving First Floor Flooding
500 year	33.3	1446	41
100 year	28.4	1254	41
50 year	26.0	1177	34
20 year	22.8	760	26
10 year	20.2	433	16

5. PLAN FORMULATION RATIONALE

This section identifies various flood damage reduction measures applicable to the Randolph study area and evaluates their viability with respect to engineering and economic feasibility.

Structural Measures

Several structural measures were briefly evaluated to determine if a potential structural plan would be justified for the Randolph study area. Those measures considered viable for the Randolph area, such as dikes and floodwalls or channel modifications, were found to lack sufficient economic justification, and, therefore, were eliminated from further study.

Nonstructural Measures

Based on the initial meeting with the local/State entities, the locally preferred solution is a nonstructural solution and, specifically, "an acquisition and relocation plan."

An acquisition/relocation alternative was considered to be most compatible with the goals for property revitalization and floodplain management which are currently being investigated in the study area by the Randolph community development office. Three variations of an acquisition/relocation solution proposed by the town of Randolph were evaluated. The three plans failed to meet the criteria set forth in the Corps of Engineers Planning Guidelines established for the development of nonstructural alternatives. A complete nonstructural plan must achieve a certain level of protection and must be carried out in the entire community or portion of the community for which that level of protection has been designated.

Based on this criteria, three alternative acquisition/relocation plans were developed corresponding to the 10, 20 and 30-year flood event. Protection from the 50 and 100-year event were also considered, but the plans resulted in a significant decrease in the benefit cost ratio.

The 10, 20 and 30-year plans differ by the number of properties to be acquired (see Enclosure 2). Each plan would involve the acquisition and demolition of all residential and commercial properties within the boundaries of the specified flood event. The town offices and fire station would be relocated to a new facility to be constructed as part of the project. Cost estimates for each plan are presented in Table 2.

TABLE 2

ESTIMATED COSTS FOR ACQUISITION/RELOCATION PLANS

($000)

	10-YEAR	20-YEAR	30-YEAR
REAL ESTATE	$1,250	$2,160	$2,362
ACQUISITION	78	123	135
DEMOLITION	48	78	90
CONSTR. TOWN OFFICE	150	150	150
SUBTOTAL	$1,526	$2,511	$2,737
ENGR & DESIGN AND SUPERVISION & ADMIN.	20	25	25
TOTAL CONSTRUCTION COST	$1,546	$2,536	$2,762
PREAUTHORIZATION STUDY COSTS	150	150	150
TOTAL PROJECT COST	$1,696	$2,686	$2,912
TOTAL ANNUAL COST	$ 153	$ 242	$ 262

Annual costs/benefits are amortized over a 50-year period at the current interest rate of 8-7/8 percent. Project costs do not include relocation assistance.

Expected annual losses were estimated for each plan using standard damage-frequency integration techniques. For the properties in the Randolph study area the annual flood losses are estimated to be approximately $132,000, $159,100, and $162,600, respectively, for the evacuation plans at the 10-year, 20-year and 30-year levels.

Annual benefits were derived for each plan based on the reduction in annual flood losses and projected recreational opportunities at the evacuated site.

The economics of each plan are contained in Table 3.

TABLE 3

Economic Analysis

Acquisition Plan	First Cost	Annual Cost	Annual Benefits	B/C Ratio
10-year	$1,696,000	$ 153,000	$ 140,000	0.92 to 1
20-year	2,686,000	242,000	167,000	0.69 to 1
30-year	2,912,000	262,000	170,000	0.65 to 1

As indicated in Table 3 above, none of the acquisition plans have a benefit-cost ratio greater than unity.

6. CONCLUSIONS AND RECOMMENDATIONS

Reconnaissance scope studies show that there is insufficient economic justification to warrant further detailed investigation of flood control measures along the Kennebec River at Randolph, Maine. As a result, the Corps of Engineers is terminating this study effort. It is recommended that the town of Randolph encourage the businesses in the study area to purchase flood insurance.

TOWN OF RANDOLPH
INCORPORATED 1887
COUNTY OF KENNEBEC
RANDOLPH, MAINE 04345

OFFICE OF SELECTMEN

Dec. 16, 1985

Colonel Thomas Rhen
Division Engineer
New England Division
US Army Corps of Engineers
424 Trapelo Road
Waltham, Ma. 02254

Dear Colonel Rhen,

We are writing to ask the Corps of Engineers' assistance in determining the feasibility of a non-structural flood protection project for the community of Randolph, Maine.

Our community is currently in the process of revitalizing the downtown business area and low to moderate income housing under a Community Development Block Grant from the Maine State Planning Office. However, due to the extreme flood vulnerability of this particular area, the project can only serve to maintain the status quo and offers no chance for expanding the downtown business area.

Working with the State of Maine flood insurance coordinator, we realize that the problems are great and the solutions equally difficult. In our opinion, structural flood protection projects are not practical since the only areas available for such projects are in the floodway. The solution to our problem appears to be a non-structural solution such as an acquisition and relocation program.

Therefore, we respectfully request that the Corps of Engineers initiate a reconnaissance study of flooding problems in Randolph, Maine, to determine if further federal involvement is justified and warranted.

We have the utmost respect for the Corps of Engineers' capabilities in the area of floodplain management, and look forward to hearing from you at an early time regarding this request. Thank you for your consideration.

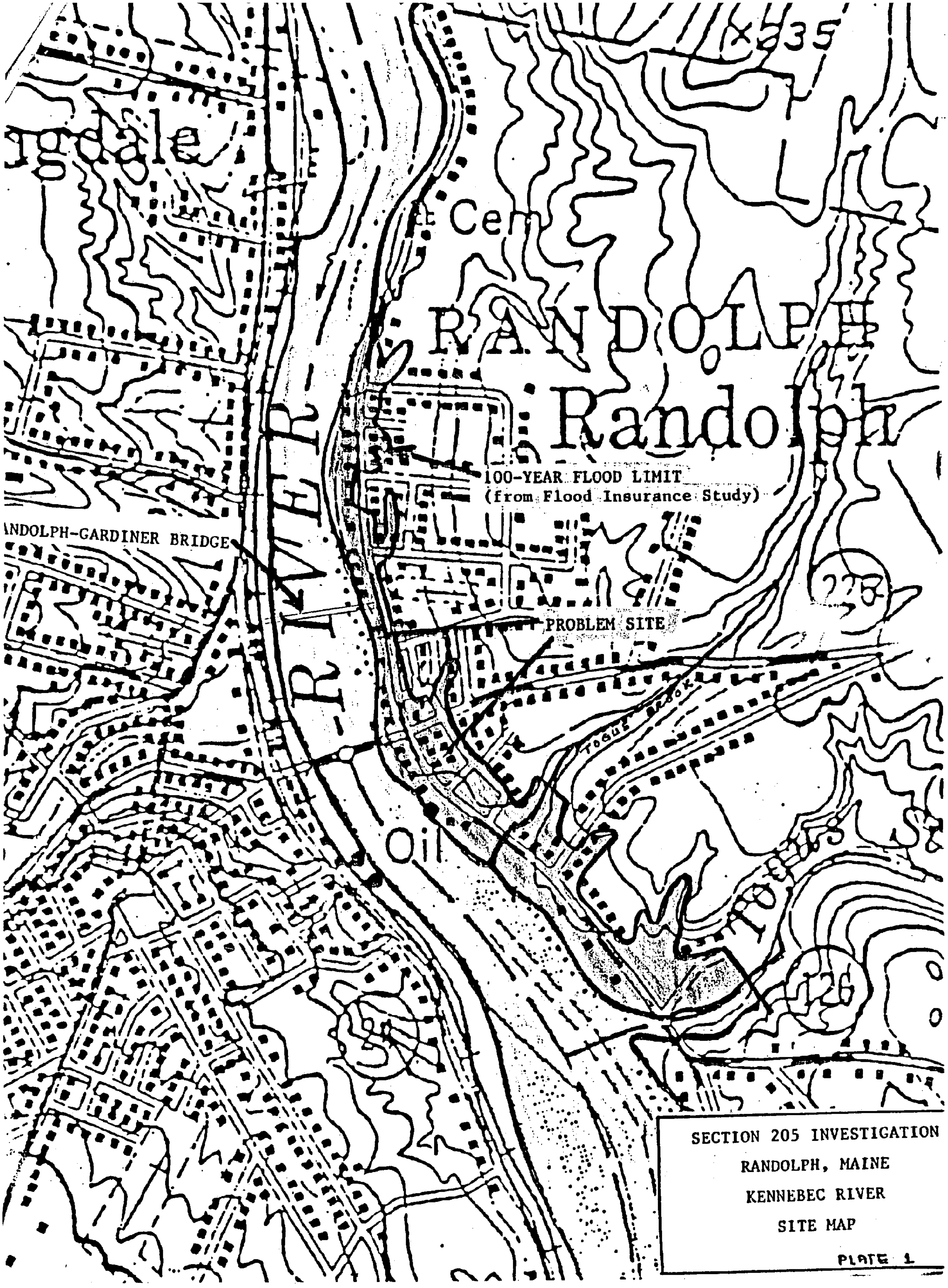
Sincerely,

R. Gloria Mansir Fitzherbert
Roland Whittier
Norman A. McKnight Chairman

The Randolph Board of Selectmen

BOS/bd

Enclosure 1



SECTION 205 INVESTIGATION
RANDOLPH, MAINE
KENNEBEC RIVER
SITE MAP
PLATE 1

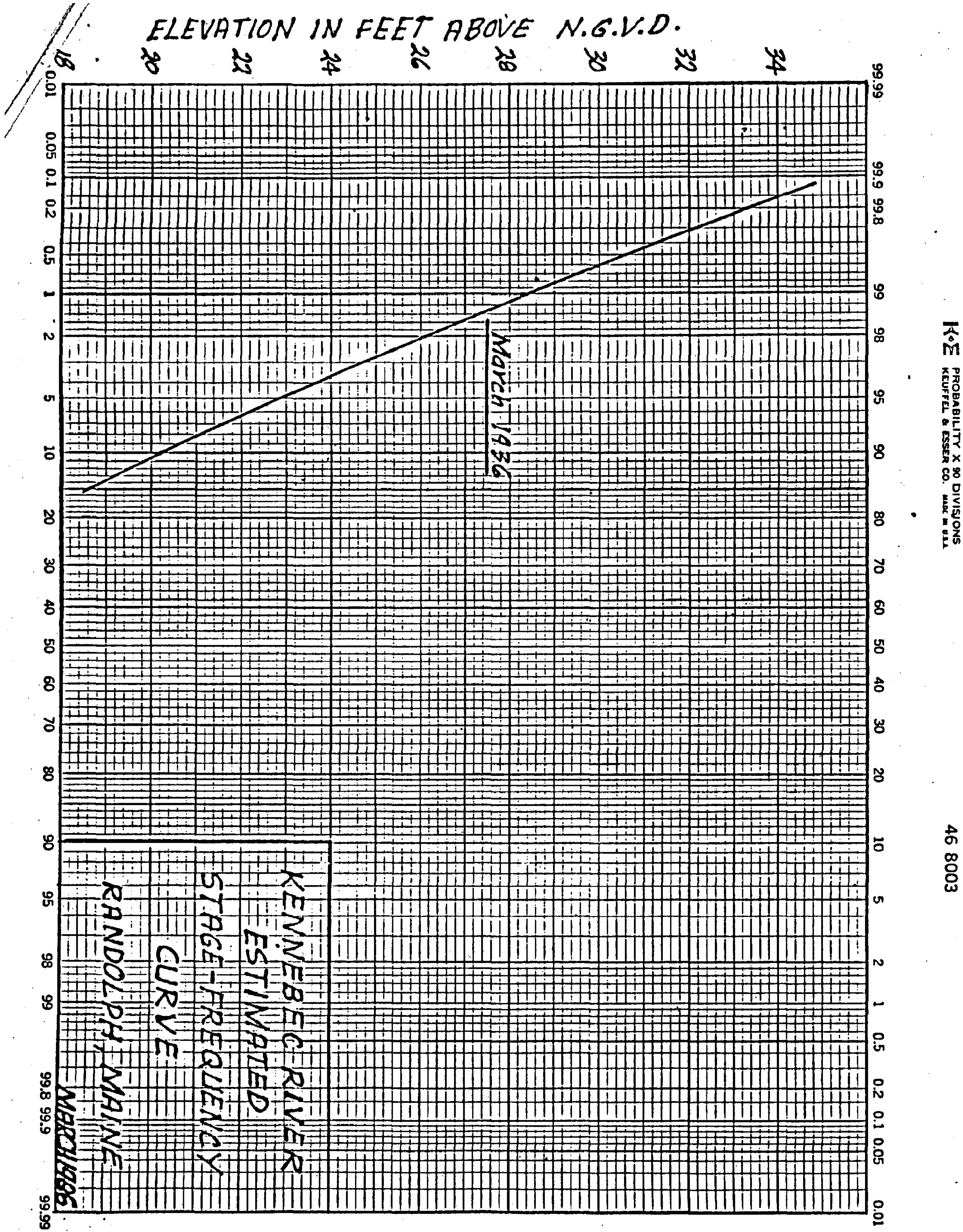

ELEVATION IN FEET ABOVE N.G.V.D.
18
20
22
24
26
28
30
32
34
March 1936
KENNEBEC RIVER
ESTIMATED
STAGE-FREQUENCY
CURVE
RANDOLPH, MAINE
MARCH 1986
K+E PROBABILITY X 90 DIVISIONS
KEUFFEL & ESSER CO. MADE IN U.S.A.
46 8003

PLATE 2

ENCLOSURE 2

PROPERTIES INVOLVED IN AQUISITION/RELOCATION PLANS

AQUISITION PLAN		PROPERTY TO BE AQUIRED		AQUISITION PLAN		PROPERTY TO BE AQUIRED	
:10 YEAR:	1	M-1	L-1	:20 YEAR:	17	M-2	L-48
	2		L-2		18		L-50
	3		L-4		19		L-51
	4	M-2	L-19		20		L-16
	5		L-40		21		L-3
	6		L-41		22		L-5
	7		L-42		23		L-12
	8		L-44		24		L-13
	9		L-1		25		L-77
	10		L-2		26		L-84
	11		L-6				
	12		L-7	:30 YEAR:	27	M-2	L-4
	13		L-8		28		L-11
	14		L-14		29		L-20
	15		L-79		30		L-83
	16		L-81				

VACANT LOTS TO BE AQUIRED

AQUISITION PLAN		PROPERTY T BE AQUIRED		AQUISITION PLAN		PROPERTY TO BE AQUIRED	
:10 YEAR:	1	M-1	L-3	:20 YEAR:	12	M-2	L-49
	2		L-5		13		L-49A
	3		L-6		14		L-49B
	4		L-7		15		L-9
	5		L-8		16		L-10
	6	M-2	L-43				
	7		L-45	:30 YEAR:	Includes all of the above properties.		
	8		L-46				
	9		L-47				
	10		L-78				
	11		L-80				

Properties and sill elevations were taken from plans provided by the Randolph Community Development Office. The 20-YEAR plan includes those properties aquired under the 10-YEAR plan. The 30-YEAR plan includes those properties aquired under the 10 and 20-YEAR plans.