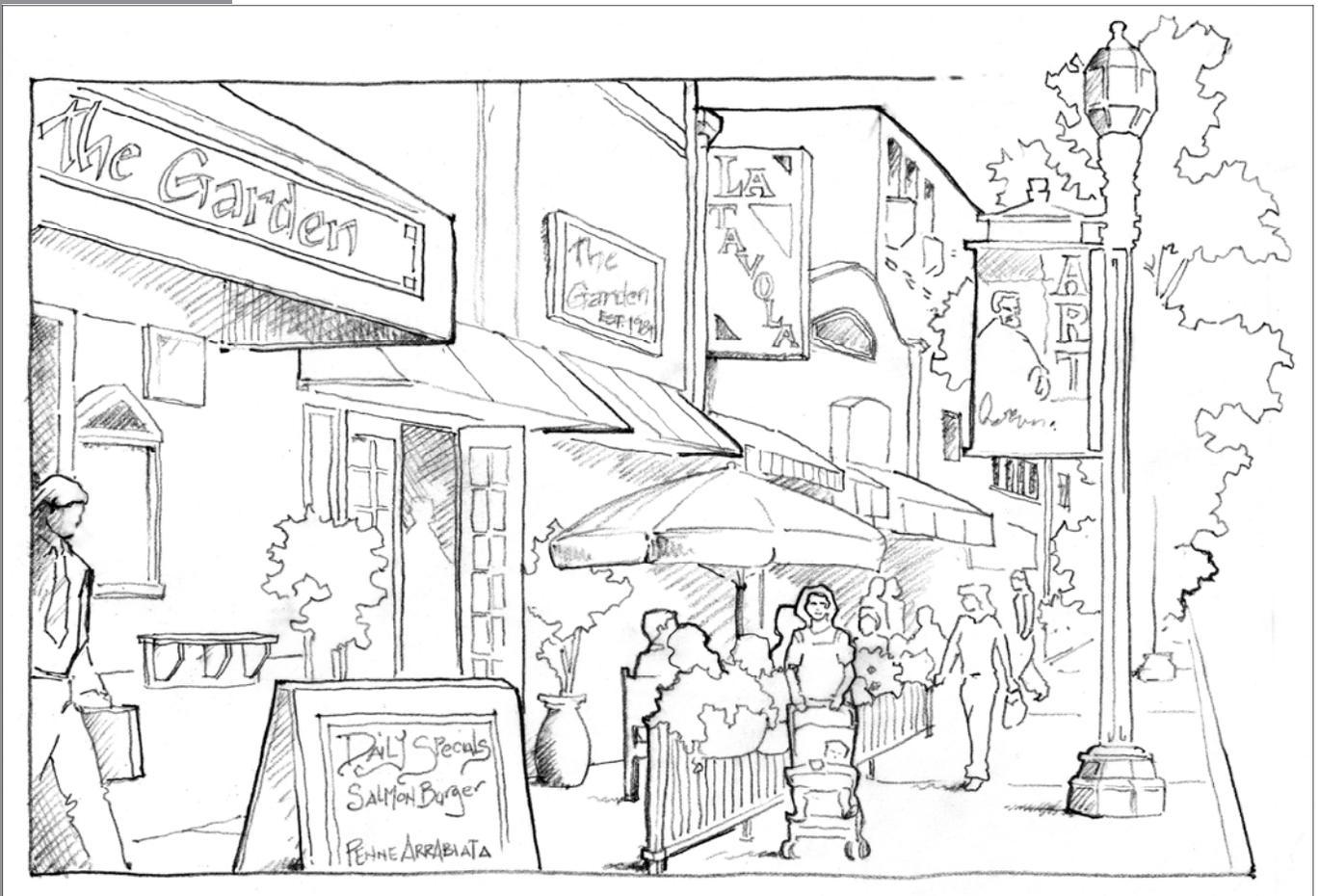


Sedalia, Missouri

DOWNTOWN  
REVITALIZATION &  
ECONOMIC  
ASSISTANCE FOR  
MISSOURI

# RETAIL MARKET ANALYSIS



SEPTEMBER 2009



PGAVURBANCONSULTING



## ACKNOWLEDGMENTS



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## EXECUTIVE SUMMARY

The City of Sedalia (the “City”) is participating in the Downtown Revitalization and Economic Assistance for Missouri (DREAM) Initiative, a three-year planning process. The planning process includes a retail market research component that defines Downtown’s trade areas, analyzes demographic and employment data, and compares retail supply and demand in the context of the local retail market. This Retail Market Analysis presents the market research and proposes goals and strategies for building Downtown residential population, enhancing the Downtown environment in general, and strengthening existing retail businesses.

To achieve these results, the DREAM Initiative recommends Downtown Sedalia employ various retail development strategies. All of the strategies found on pages 23-31 are important, but the following are key strategies:

- 1) Increase the retail customer base by developing a Downtown Residential Plan to attract potential residents such as artists, entrepreneurs, and military families. The City should develop a streamlined process for high-quality loft developments and encourage the rehabilitation of Downtown buildings. Residential efforts should be developed in concert with the existing Building Department. SDDI can leverage these three groups to benefit from their contacts and expertise. This strategy is included with other residential strategies on page 24.*
- 2) Improve the retail atmosphere by conducting a thorough review of City codes, procedures, and ordinances that effect Downtown buildings and businesses. Adjustments to criteria and liable parties for unsafe, vacant, or poorly maintained buildings may be required to minimize deleterious effects on retail. Sign code improvements and building design guidelines should be considered. Improvement of physical assets will enhance retail uses. This strategy can be found on page 27.*
- 3) Improve retail parking. Existing lots have the potential to be attractive meeting places for visitors, but require improvements and enhancements that tie in with the streetscape. It is likely that a few spaces could be converted to provide better landscaping and greener parking areas. The strategy is located on page 25.*
- 4) Beautify the Ohio Avenue and Broadway Boulevard intersection. This entryway is critical to Downtown and can accommodate an eye-catching park and plaza containing monuments to Sedalia’s heritage on the northwest quadrant. The City should seek to obtain the necessary property or easements as phase III of the Ohio Avenue streetscape is design. This strategy is found on page 26.*

The strategies noted above comprise the core of a sound retail enhancement plan that includes efforts for existing businesses, residents, visitors, and potential businesses. The remaining strategies found in this report support and enhance these initiatives.

## INTRODUCTION

In most cities born of traditional origins, Downtown was the center of social and commercial exchange. It is, or once was, the place to find the shops and restaurants, employment, and entertainment. The Downtown is, or once was, the pre-eminent center of social and commercial life; where the city hung its hat.

In many instances, modern development trends have diminished the function of the typical American Downtown. Shopping habits have shifted to the big-box stores on the outskirts of town. Shopping centers and major retailers have located along highways. The mobility of the consumer has increased, partly due to increased reliance on the automobile. Auto-oriented retail centers have generally located outside of the traditional Downtown and resulted in a loss of commercial activity for Downtowns. Smaller businesses have struggled to maintain their traditional Downtown locations, as residents, visitors, and fellow businesses have followed retail development to the City's outskirts.

Sedalia has felt the effects of these development trends, but is fortunate to still have a Downtown that is the civic and social center of the City. Downtown has local government facilities, professional offices, churches, art galleries, a hotel, performance venues, shops, offices, and restaurants. Sedalia is also a commercial center for the surrounding region attracting many consumers from the Kansas City area.

Today, Downtown contains a mix of retail uses that contribute to a diverse environment. Destination-oriented retailers offering products such as clothing, furniture, jewelry and other specialty items are commonly found. People no longer shop Downtown for their general merchandise. Downtown is a destination for an experience not found at larger retailers. In addition to the retail atmosphere, services and residents are also important to Downtown.

This report presents information and recommended strategies for strengthening Downtown Sedalia's retail base. The first part of this report focuses on the "Retail Supply" side of the retail market by considering the current inventory of retail space and existing retail businesses. This is followed by an examination of the "Retail Demand" side of the retail market, which reviews demographic trends and consumer spending patterns in the greater Sedalia area. These two halves of the retail marketplace are then compared in a "Market Analysis" to identify the types of retail services that could likely be supported by existing unmet consumer demand. Finally the report will conclude with recommended "Goals and Strategies" for encouraging retail development in Downtown Sedalia and attracting the retail services identified in the market analysis and recent surveys of Sedalia's residents.

This report provides analysis for three geographic areas. First, Downtown Sedalia (Downtown is defined as the DREAM Study Boundary. Downtown's Primary Trade Area (PTA) is defined as the Sedalia City limits. The Secondary Trade Area (STA) is any point within a 30-minute drive of Downtown. Exhibits showing each area are included in Appendix I.

A review of key demographic and employment data shows that Downtown's PTA, the City, has an estimated 2008 population of 20,530 people in 8,693 households. With a population of 48,409, the STA is about two and a third times the size of the PTA. A total of 18,924 households are located in the STA. Approximately 14,509 jobs are located throughout the PTA, with 1,580 of those located in Downtown Sedalia at 215 establishments. Approximately 44% of Downtown employees reside within the PTA. An estimated 71% of Downtown employees commute from within Pettis County.

Determining the retail supply of Downtown Sedalia includes a review of the DREAM Land Use, Building, and Infrastructure Survey conducted by Sedalia volunteers. The survey shows that, at the time of the survey, Downtown had about 715,000 square feet of first-floor commercial space. About 204,000 square feet of first-floor space was used as retail or restaurant space and an additional 127,350 square feet was vacant. The 204,000 square feet of Retail/Restaurant Space generated about \$16 million annual sales or about \$81 per square foot. The 127,350 square feet of vacant space represents the potential for an additional \$10 million in annual sales. Using the North American Industrial Classification System (NAICS), most of Downtown Sedalia's retail establishments are classified as "miscellaneous retailers".

Information concerning retail demand was obtained using proprietary retail spending data from ESRI (a leading national provider of demographic information). Spending patterns of consumers residing in Downtown Sedalia's Primary and Secondary Trade Areas are analyzed. Consumers residing in the PTA spend over \$180 million per year, and the roughly 19,000 households within the STA spend approximately \$213 million per year on retail and restaurants. This expenditure data is essential for understanding the potential for retail expansion in Downtown Sedalia. Household income data and disposable income profiles are also analyzed to assess retail demand within the trade areas. Information obtained from ESRI may not match the existing conditions as surveyed by PGAV.

Comparing consumer demand to actual sales, or supply, within Downtown Sedalia and the trade areas provides insight to the performance of the local retail market. By analyzing this data for each retail category, unmet retail demand can be identified. This unmet demand is a prime target for either existing or new retail businesses to increase Downtown sales.

Using this methodology, unmet demand was identified in the following retail categories:

- Furniture Stores
- Home Furnishing Stores
- Electronics & Appliance Stores
- Grocery Stores
- Specialty Food Stores
- Beer, Wine, & Liquor Stores
- Clothing and Clothing Accessories Stores
- Shoe Stores
- Jewelry, Luggage, and Leather Goods Stores

- Book, Periodical, and Music Stores
- Florists
- Office Supplies, Stationary, and Gift Stores
- Used Merchandise Stores
- Miscellaneous Store Retailers
- Full-Service Restaurants

Using assumptions about sales per square foot and data on unmet retail demand, it is possible to estimate approximately how much new retail floor area could be absorbed in Downtown Sedalia. For instance, approximately 18,300 square feet of home furnishing store retail space could be supported by unmet demand. An additional 13,600 square feet of retail space could be filled by an electronics & appliance store. The largest opportunity for Sedalia is the category of grocery store with 183,105 square feet retail space that could be supported by unmet demand. However, in Sedalia's case it is known that Woods' Grocery recently relocated not far to the East of Downtown. Therefore any grocery opportunity should be carefully planned.

The final step of the analysis involved matching vacant space with suggested retail or restaurant categories. A geographic review of available vacant space shows that about 44,500 square feet of the 127,350 square feet of vacant space is located South of 3rd Street, with a large amount, 29,000 square feet, located at the previous site of Woods' Grocery on East Broadway. Therefore most (65%) of the available retail opportunity is located in the northern section of the DREAM Study Area; an important fact when allocating vacant space.

The DREAM Initiative includes a Community/Consumer survey task that conducted focus groups and a telephone survey. The results from this task helps identify retail opportunities.

Some key points of the focus groups are relevant to retail development include:

- All groups said that Downtown parking is inconvenient, some expressed very strong opinions about this issue
- All groups felt that improvements to infrastructure, aesthetics, business hours, signage, and lighting would help the Downtown
- All groups said that more residents are needed Downtown
- Groups also felt that Downtown needed to work on an identity
- Participants indicated a preference for additional restaurants and a Downtown "anchor" like Macy's
- Low-end "flea market" type stores were not viewed favorably

Phone survey respondents prioritized business types. The following list indicates the highest priority listed first:

- Department store or other anchor store
- Upscale or casual-style dining
- Clothing stores

- Ice cream shops
- Bookstores
- Specialty shops
- Art galleries and shops

Based on the retail market data and the unique assets of Downtown, retail development goals and strategies were then developed. These goals and strategies are found on page 23.

## UNDERSTANDING RETAIL TRADE AREAS

The term “Trade Area” refers to the geographic area from which a majority of a given business’s customers originate. Different categories of retail businesses have different trade areas. The trade area for a convenience store or hair salon might be quite small, whereas a specialty electronics retailer or a car dealership would have a much larger trade area. To determine the trade area of a shopping center or entire retail district, an average must be used to even out differences between each type of business. The concept of trade areas is an important part of evaluating the performance of a retail district and determining the potential to expand retail activity.

Retail market analysis evaluates two different geographic trade areas: a Primary Trade Area (PTA) and a Secondary Trade Area (STA). For this study, the PTA is identified as the Sedalia City limits. The STA is any point within a 30-minute drive of Downtown. The 30-minute drive boundary represents a catch-basin of consumers likely to make a shopping trip to Downtown. The 30-minute drive time also indicates a typical commute time for the PTA’s labor pool. A map of each area is included in Appendix I and the three geographic areas of analysis are summarized below.

- ◆ Downtown Sedalia (or “Downtown”): The focus of this analysis is to determine the current level of retail activity captured by Downtown Sedalia and the amount, if any, of additional retail activity that could be captured by addressing areas of unmet demand. Downtown Sedalia is defined as the DREAM Study Boundary, which is illustrated in Appendix A.
- ◆ Primary Trade Area: The City Limits. PGAV has classified the City of Sedalia as the PTA because Downtown Sedalia draws many of its shoppers from the City. This PTA classification will also show the relationship between retail activity Downtown and Citywide.
- ◆ Secondary Trade Area: PGAV has defined the STA as a 30-minute drive-time “catch-basin” around Downtown Sedalia. The City attracts an estimated ninety to ninety-five percent (90%-95%) of all retail dollars from this area.

## DEMOGRAPHIC PROFILE

In order to understand the potential for retail development in Downtown Sedalia, it is important to study the population and households in the respective trade areas. Key information includes household incomes and average annual expenditures of the households in the area. These statistics provide the number of consumers and an idea of the demand, or available spending dollars, for retail in each of the trade areas.

The most current official population data is estimated based on the last decennial national census, conducted in 2000.

### Downtown Sedalia Statistics

Downtown Sedalia (Figure 1; the DREAM Study Boundary) is situated in what the central, northern part of Sedalia and consists of approximately 240 buildings on 35 city blocks. Before presenting data on the City as whole, some discussion of Downtown Sedalia is useful.

As of 2008, the population of Downtown was 230 people living in 86 households for an average of 2.7 people per household. The average household income was \$33,407 and the median age of residents was 31.5 years. Approximately 28% of the population were age 19 or younger; 44% between 20 and 44; and 28% were age 45 or older.

**Figure 1: Downtown Sedalia**



Table 1 illustrates current demographics and future demographic trends for Downtown.

**Table 1: Downtown Sedalia Demographic Trends**

Downtown Sedalia Demographic Trends					
Year	2000	2008	2013	Percent Change 2000-2008	Percent Change 2008-2013
Total Population	242	230	230	-4.96%	0.00%
Total Households	92	86	86	-6.52%	0.00%
19 and Under	74	65	68	-11.52%	4.95%
20-44	110	100	91	-8.73%	-9.17%
45 and Over	59	65	71	10.29%	8.87%
Median Age	30.0	31.5	32.9	5.00%	4.44%
Average Household Income	\$25,687	\$33,407	\$38,070	30.05%	13.96%

### Primary Trade Area Statistics

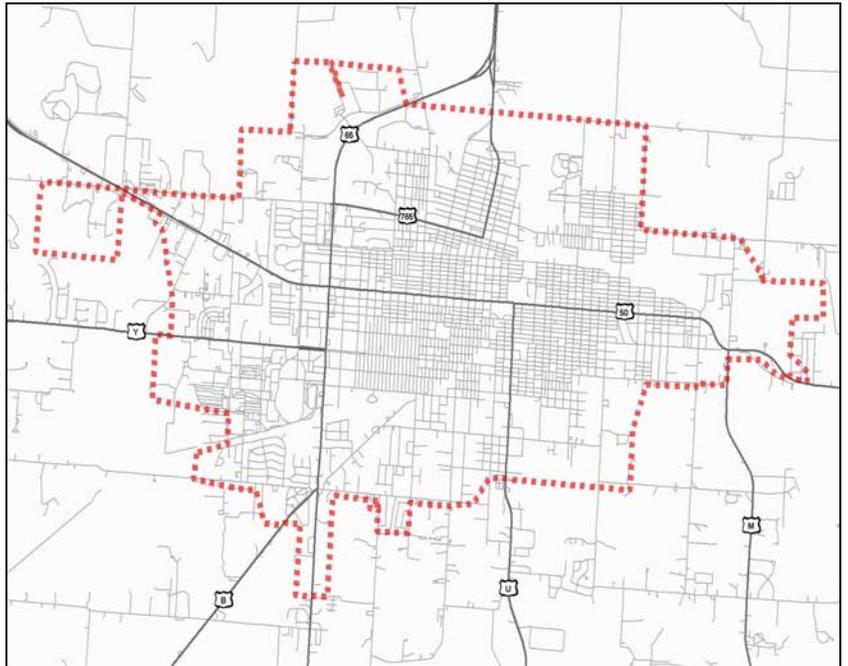
As described in the previous section, the Primary Trade Area (PTA) is identified as the City limits of Sedalia (Shown in Figure 2).

The City of Sedalia is located in West-Central Missouri about 87 miles east of Kansas City.

As of 2008, the population of the city was 20,530 people living in 8,693 households for an average of 2.4 people per household. The average household income was \$46,238 and the median age of residents was 36.5 years. Approximately 27% of the population were 19 or younger; 35% between 20 and 44; and 38% were age 45 or older.

Table 2 illustrates current demographics and future demographic trends for the Primary Trade Area.

**Figure 2: Primary Trade Area**



**Table 2: Primary Trade Area Demographic Trends**

Primary Trade Area Demographic Trends					
Year	2000	2008	2013	Percent Change 2000-2008	Percent Change 2008-2013
Total Population	20,339	20,530	20,903	0.94%	1.82%
Total Households	8,628	8,693	8,854	0.75%	1.85%
19 and Under	5,675	5,502	5,560	-3.04%	1.06%
20-44	7,180	7,062	6,773	-1.63%	-4.10%
45 and Over	7,485	7,986	8,570	6.70%	7.31%
Median Age	35.8	36.5	37.9	1.96%	3.84%
Average Household Income	\$37,284	\$46,238	\$52,704	24.02%	13.98%

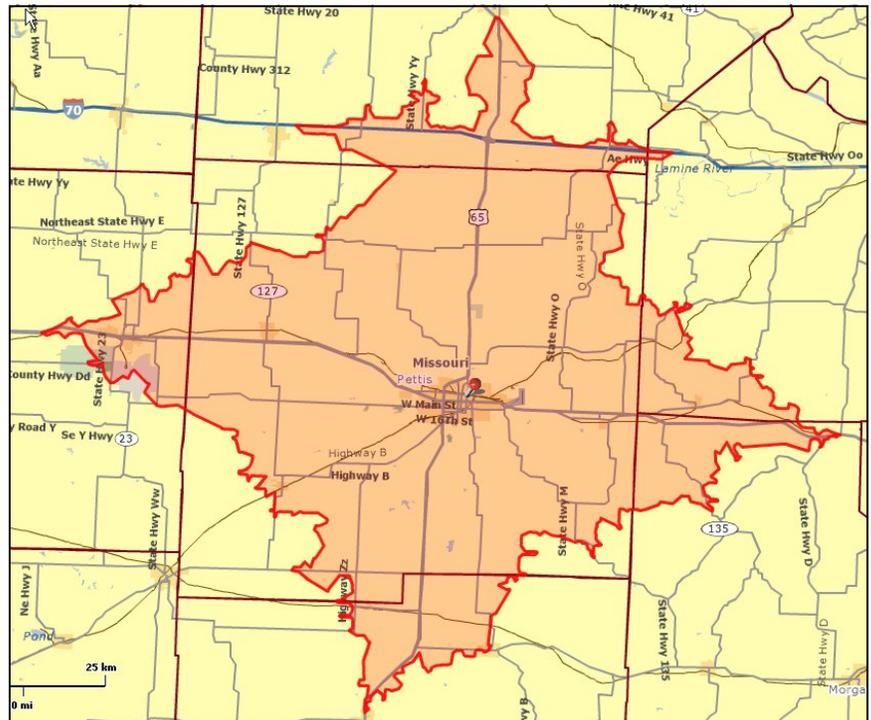
## Secondary Trade Area Statistics

As described in the previous section, the Secondary Trade Area (STA) is identified as an area within a 30-minute drive time of Downtown Sedalia (Shown in Figure 3).

As of 2008, the population of the STA was 48,409 people living in 18,924 households for an average of 2.6 people per household. The average household income was \$50,727 and the median age was 35.9 years. About 27% of the population are age 19 or younger; 35% between 20 and 44; and 38% were age 45 or older.

Table 3 illustrates current demographics and future demographic trends for the Secondary Trade Area.

**Figure 3: Secondary Trade Area**



**Table 3: Secondary Trade Area Demographic Trends**

Secondary Trade Area Demographic Trends					
Year	2000	2008	2013	Percent Change 2000-2008	Percent Change 2008-2013
Total Population	47,070	48,409	49,752	2.84%	2.77%
Total Households	18,391	18,924	19,472	2.90%	2.90%
19 and Under	14,168	13,361	13,533	-5.70%	1.28%
20-44	16,804	16,653	16,169	-0.90%	-2.90%
45 and Over	16,098	18,444	20,000	14.57%	8.44%
Median Age	34.7	35.9	37.2	3.46%	3.62%
Average Household Income	\$34,534	\$50,727	\$57,865	46.89%	14.07%

## Employment

There are about 14,509 jobs in the PTA, 1,580 (11%) of which are located in 215 establishments in Downtown for an average of 7.4 jobs per establishment. The retail sector employs 251 jobs (16%) of the total Downtown workforce, and 73 (5%) jobs are in the Food & Service Industry.

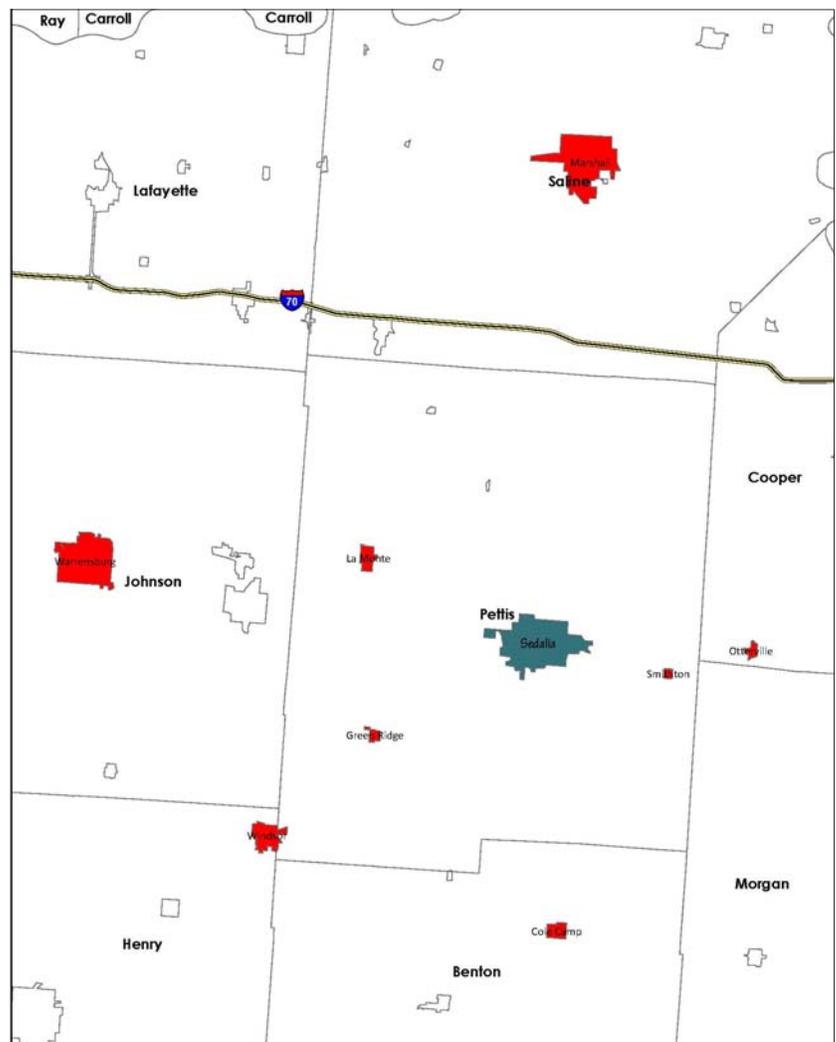
Of Downtown's 215 employer establishments, 49 are classified as retail and food and service industry. Eight of these establishments are eating and drinking places. Most of the retail jobs located in Downtown are in the miscellaneous retailer category.

In the PTA, there are 3,479 retail and food and service industry jobs (24% of all jobs) at 321 establishments.

Approximately 44% of the Downtown workers reside in the City and about 71% reside within Pettis County.

A majority of Downtown employees commute from the surrounding area, including such cities as Marshall, Windsor, La Monte, Otterville, Warrensburg, Cole Camp, and Green Ridge. The location of these cities is illustrated in Figure 4.

**Figure 4: Surrounding Communities**



## RETAIL SUPPLY

The Downtown Trade Area consists of 111 acres with about 715,000 square feet of existing first-floor commercial/retail space. In reviewing the DREAM Land Use, Building, and Infrastructure Survey, PGAV estimates 204,000 square feet of this first-floor space is used as retail/restaurant space and another 127,350 square feet is vacant. The remaining space is a non-retail commercial use. The 204,000 square feet of retail/restaurant space is generating about \$16 million in sales annually or about \$81 per square foot. The 127,350 square feet of vacant space represents the potential for an additional \$10 million in annual sales to the City.

Table 4, below, indicates the number of retail establishments in Downtown Sedalia, the City of Sedalia, and Pettis County and shows most retail establishments in Downtown are categorized as “Miscellaneous Retail.” A map of the retail establishments is located in Appendix E.

**Table 4: Retail Establishments**

Retail Establishments						
	Downtown Sedalia		City of Sedalia		Pettis County	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
Retail Trade Summary	49	251	321	3,479	397	3,875
Home Improvement	2	15	22	199	29	223
General Merchandise Stores	3	9	13	741	14	741
Food Stores	3	40	38	294	46	326
Auto Dealers, Gas Stations, Auto Aftermarket	4	19	53	418	72	608
Apparel & Accessory Stores	1	1	13	52	17	55
Furniture & Home Furnishings	4	22	23	125	29	148
Eating & Drinking Places	8	73	68	1,194	80	1,238
Miscellaneous Retail	24	72	91	456	110	536
<b>Total Businesses</b>	215		1,236		1,686	
<b>Total Employees</b>	1,580		14,509		18,164	
<b>Total Residential Population</b>	230		20,503		40,094	
<b>Daytime (Employee)/Nighttime (Population) Ratio</b>	6.78		0.71		0.45	

At various times during the Land Use, Building, & Infrastructure Survey, PGAV surveyed retail operations in Downtown Sedalia. Because the business cycle of Downtown is quite complex and dynamic, a sample of the most recent retail services is listed in Table 5 on the following page. This listing is organized according to the North American Industrial Classification System (“NAICS”). Using the NAICS system allows this “snapshot” to compare retail activity by categories. This report recommends retail establishments to fit gaps in retail service.

Downtown Sedalia’s primary retail competition comes primarily from the South and West along the highways 65 and 50. Specifically from the Thompson Hills Shopping Area and the State Fairgrounds Area.

\* Retail Sales do not include Automobile, gasoline or non-store retailer sales.

**Table 5: Existing Retail Supply**

Industry Group	Store Name
<b>Furniture &amp; Home Furnishings Stores</b>	McLaughlin Bros Furniture
<b>Electronics &amp; Appliance Stores</b>	House of Vacuums
<b>Bldg Materials, Garden Equip. &amp; Supply Stores</b>	Home Lumber Co.
	Lange Feeds
<b>Food Stores</b>	European Food Market
	Wine & More
<b>Health &amp; Personal Care Stores</b>	Swords Family Pharmacy
	Conception Bridal & Boutique
<b>Clothing and Clothing Accessories Stores</b>	Jeans-n-More
	Kay's Bridal
	Nostalgia Vintage Clothing
<b>Jewelry, Luggage, and Music Stores</b>	Classic Jeweler
<b>Book, Periodical, and Music Stores</b>	Mr Vinyl's
	Shepard's Place Christian Bookstore
	Stereo Clinic
	Wilken Music
<b>Miscellaneous Store Retailers</b>	Art Gallery
	Art Impressions
	Cecil's Cyclery
	Country Ruffle
	Dollar General
	Douglass Freed Art Studio
	Game Zone
	Jingles
	Kay's Crafts
	Kust M Thunder
	Main St. Logo
	Mozarkite Rock Shop
	The Pet Shop
	Pro-Velo Cycle Sport
	Sarah Janes Boutique
	Sedalia Hobby
	State Fair Floral Co
<b>Used Merchandise Stores</b>	Becca's Framing Antiques Interiors
	Chelsea's Antiques
	Juanita's House Antiques
	Maple Leaf Antique Mall
	Open Door Thrift Store
	Osage Thrift Shop
	Salvation Army Thrift Store
<b>Arts, Entertainment, and Recreation Services</b>	Sam's Place Antiques
	Lets Dance Ballroom Dancing
	Eddie's Drive-In
	Rumors Ultra Lounge
	Sassy's Soda Shoppe
	Chez-When
	Coach's Sports Bar & Grill
	Ivory Grill
	Copper Wolfe Ice Cream & Deli
	5th Street Brew Pub & Grill
<b>Food Services &amp; Drinking Places</b>	Wine & More
	Club 208
	The Cake Lady
	Ivy Cottage Tea Room
	Big Shot's Mens Salon
	Ohio Hair Company
	Shampoo Hair Salon
<b>Other Services</b>	Total Look Salon
	Waunita's Salon

## RETAIL DEMAND

The spending habits of consumers in the three trade areas are important to this analysis because they provide the basis for the determination of demand. How much each household spends on average per retail sector provides an idea of the demand for particular retail services within a given trade area. Table 6 provides per-household annual consumer expenditures for eight main categories and several sub-categories of retail expenditures.

**Table 6: Household Income and Consumer Expenditures**

Retail Sector	Downtown Sedalia	Secondary Trade Area
Average Household Income	\$32,077	\$50,244
Total Households	88	18,833
<b>Average Annual Consumer Expenditures Per Household</b>		
<b>General Merchandise</b>	\$862.80	\$1,378.01
<b>Food</b>	\$3,939.56	\$5,960.14
Food at Home	\$2,552.08	\$3,905.59
Food Away from Home	\$1,387.48	\$2,054.56
<b>Apparel and Services</b>	\$1,177.53	\$1,695.36
<b>Household Merchandise</b>	\$864.65	\$1,338.61
Electronics	\$346.93	\$509.64
Household Goods	\$517.72	\$828.97
<b>Household Care</b>	\$166.41	\$329.05
<b>Transportation</b>	\$1,361.25	\$2,264.71
<b>Miscellaneous Merchandise</b>	\$950.47	\$1,541.50
Health Care	\$355.25	\$622.67
Miscellaneous Goods	\$595.22	\$918.83
<b>Entertainment &amp; Recreation</b>	\$1,461.81	\$2,380.49

Further analysis of Table 6 compares the total of Downtown expenditures for the selected categories (\$10,784) with the STA (\$16,888). Comparing each category one will only find small differences between Downtown expenditures and STA expenditures. The most notable difference indicates that, as a percentage of total expenditures, Downtown households spend 1.2% more on food than STA households.

The tables on the following page depict Sedalia’s potential purchasing power.

Table 7-A Households by Income shows the number of households at regular income thresholds, representing the purchasing power in Downtown Sedalia, the City of Sedalia, and Pettis County.

Table 7-B Disposable Income Profiles shows the amount of disposable income, per household, for Downtown Sedalia and the STA. This table represents the volume of demand available within Downtown and the STA.

**Table 7-A: Households by Income**

Households by Income Level for Sedalia			
Income Level	Downtown	Citywide	County
Total Households	86	8,693	18,924
\$ 0 - \$14,999	17	1,347	2,366
\$ 15,000 - \$24,999	22	1,373	2,593
\$ 25,000 - \$34,999	15	1,382	2,839
\$ 35,000 - \$49,999	15	1,747	3,785
\$ 50,000 - \$74,999	13	1,721	4,315
\$ 75,000 - \$99,999	3	669	1,722
\$ 100,000 - \$149,999	1	304	814
\$ 150,000 - \$199,999	0	43	227
\$ 200,000 +	0	104	246

**Table 7-B: Disposable Income Profiles**

Disposable Income Profile for Sedalia		
Income Level	Downtown Sedalia	Secondary Trade Area
Less than \$15,000	14	2,880
\$15,000-\$24,999	18	3,321
\$25,000-\$34,999	10	3,520
\$35,000-\$49,999	11	4,188
\$50,000-\$74,999	6	3,632
\$75,000-\$99,999	1	595
\$100,000-\$149,999	0	494
\$150,000-\$199,999	0	112
\$200,000+	0	145
Total	60	18,887
Median Disposable Income	\$23,287	\$33,936
Average Disposable Income	\$28,250	\$41,506

In determining the strengths and weaknesses of Downtown Sedalia’s retail market, this report uses data from ESRI to estimate the amount of retail demand captured by Downtown Sedalia. This proprietary data provides the total amount that all households in the respective trade areas spend on retail and restaurants (demand). This figure is then compared to the amount of retail spending that actually occurs in the trade area or in Downtown Sedalia (supply). ESRI data may not match U.S. Census Bureau data, but is within an acceptable margin.

According to 2008 data provided in Table 8, all households in the STA spent an estimated \$239.3 million on retail and food and drink. An estimated \$298.9 million in sales took place in the STA, indicating that some households from outside the STA boundary made purchases here. The same holds true for the PTA, where resident households spent \$100.4 million, but about \$192.6 million (excluding auto sales, gasoline sales or non-store retail transactions) was spent within the PTA.

**Table 8: Retail Demand and Sales**

Industry Group	Secondary Trade Area (STA)		Primary Trade Area (PTA)		Downtown
	Retail Demand	Retail Sales	Retail Demand	Retail Sales	Retail Sales
Food & Drink	\$52,991,330	\$63,302,459	\$21,838,430	\$54,735,056	\$4,268,301
Total Retail Trade	\$179,513,129	\$150,501,651	\$73,096,735	\$125,776,370	\$12,226,317
Total Retail Trade and Food & Drink	\$232,504,459	\$213,804,110	\$94,935,165	\$180,511,426	\$16,494,618

Of the \$180.5 million spent in the PTA, Downtown captured approximately 9% of expenditures (\$16.5 million), which also represents approximately 17% of PTA household retail demand. Much of the remaining retail demand may still be spent within the City limits, but may be spent elsewhere, such as at the Thompson Hills Shopping Center. Table 8 summarizes the retail demand and sales for each trade area, and Appendix B provides a detailed table with these figures broken down by retail categories.

## RETAIL MARKET ANALYSIS

The fact that retail spending within the City is greater than the retail demand of the City's households indicates that the City draws shoppers from the surrounding region.

### Unmet Demand

While the City draws shoppers from outside the City limits, there are still retail services for which shoppers leave the STA. The fact that some shoppers leave the STA for certain types of retail services indicates there is a demand for goods that cannot be met in either trade area. Understanding this unmet demand reveals an opportunity for Downtown Sedalia to capture more retail spending and add to the pull of Sedalia' retail sector.

In Table 9 unmet demand (the difference between retail demand and actual sales) is listed for the retail categories having the greatest opportunity. Given the total unmet retail demand within the Secondary Trade Area and the average sales per square foot (\$81) in Downtown Sedalia, PGAV estimates that Downtown could support an additional 343,217 square feet of retail. This could be accomplished by capturing unmet demand in the specified retail sectors. Additionally, existing retailers could capture this unmet demand by expanding floor area, or new retailers could enter the marketplace.

**Table 9: Retail Opportunities**

Industry Group	Opportunity <sup>1</sup>	Possible Retail Area (sq.ft.) Supported <sup>2</sup>
Furniture Stores	\$ 2,579,507	31,846
Home Furnishing Stores	\$ 1,478,893	18,258
Electronics & Appliance Stores	\$ 1,100,614	13,588
Grocery Store	\$ 14,831,511	183,105
Specialty Food Store	\$ 273,299	3,374
Beer, Wine, & Liquor Stores	\$ 463,997	5,728
Clothing and Clothing Accessories Stores	\$ 2,073,870	25,603
Shoe	\$ 114,455	1,413
Jewelry, Luggage, and Leather Goods Stores	\$ 446,547	5,513
Book, Periodical, and Music Stores	\$ 1,181,874	14,591
Florists	\$ 244,503	3,019
Office Supplies, Stationery and Gift Stores	\$ 629,925	7,777
Used Merchandise Stores	\$ 320,288	3,954
Other Miscellaneous Store Retailers	\$ 169,823	2,097
Full-Service Restaurants <sup>3</sup>	\$ 3,502,667	23,351
<b>TOTAL</b>	<b>\$ 29,411,773</b>	<b>343,217</b>

<sup>1</sup> Indicates unmet consumer demand within the Secondary Trade Area.

<sup>2</sup> Based on \$81 in sales per square foot in Downtown Sedalia, based on existing retail inventory and activity.

<sup>3</sup> Based on \$150 per square foot in Restaurants Sales

Average sales per square foot is calculated using an estimate of gross retail sales. This number differs from the DREAM Financial Assistance Review because automobile purchases are not included in financial mechanism calculations. Automobiles are taxed where they are registered, not where they are sold. For retail activity analysis, they can be included.

### Available Retail Space Inventory

In reviewing the results of the DREAM Land Use, Building, and Infrastructure Survey task as conducted by Sedalia volunteers, PGAV noted the following vacancies:

**Table 10: Vacancies**

ID	Address	Vacant Square Footage	ID	Address	Vacant Square Footage
1	200 West Fourth	2,600	18	211 West Main	1,700
2	227 South Ohio	4,300	19	207-209 West Main	3,600
3	100 East Broadway	29,000	20	203 West Main	4,500
4	606 South Ohio	2,200	22	201 West Main	1,900
5	614 South Ohio	1,700	23	116 South Ohio	4,800
6	506-510 South Ohio	1,000	24	120 South Ohio	2,000
7	516 South Ohio	2,000	25	110 West 2nd	1,000
8	307 South Ohio	2,100	26	120 West 2nd	2,700
9	213 West Main	1,900	27	119 West Main	3,200
10	322 South Ohio	2,500	28	113 East Second	2,087
11	222-230 South Ohio	12,000	29	100 South Ohio	3,200
12	302 West Third Street	1,400	30	122-124 East Main	6,400
13	305 West Main	5,000	31	115 South Ohio	1,300
14	114 South Osage	1,939	32	106 East Main	3,700
15	116 South Osage	2,024	33	112 East Main	1,700
16	120 South Osage	4,200	34	206 West Main	2,100
17	219 West Main	1,800	35	304 West Main	3,800

The above-listed locations are depicted on the First-Floor Vacancy map in Appendix D. The total supportable retail square footage as described on the previous page is more than double the available vacant square footage in Downtown Sedalia. This situation indicates that new retail space, or the conversion of service space into retail space, could successfully occur.

Taking into consideration the retail opportunities described above, the size of each vacant space, and the location of each in Downtown Sedalia, potential retail spaces can be matched with suggested retail services. In addition, PGAV accounted for proximity to other land uses and major activity centers such as the Missouri State Fairgrounds when suggesting retail uses for vacancies.

Table 11 below presents the parcel ID key, address, available square footage, and potential retail use.

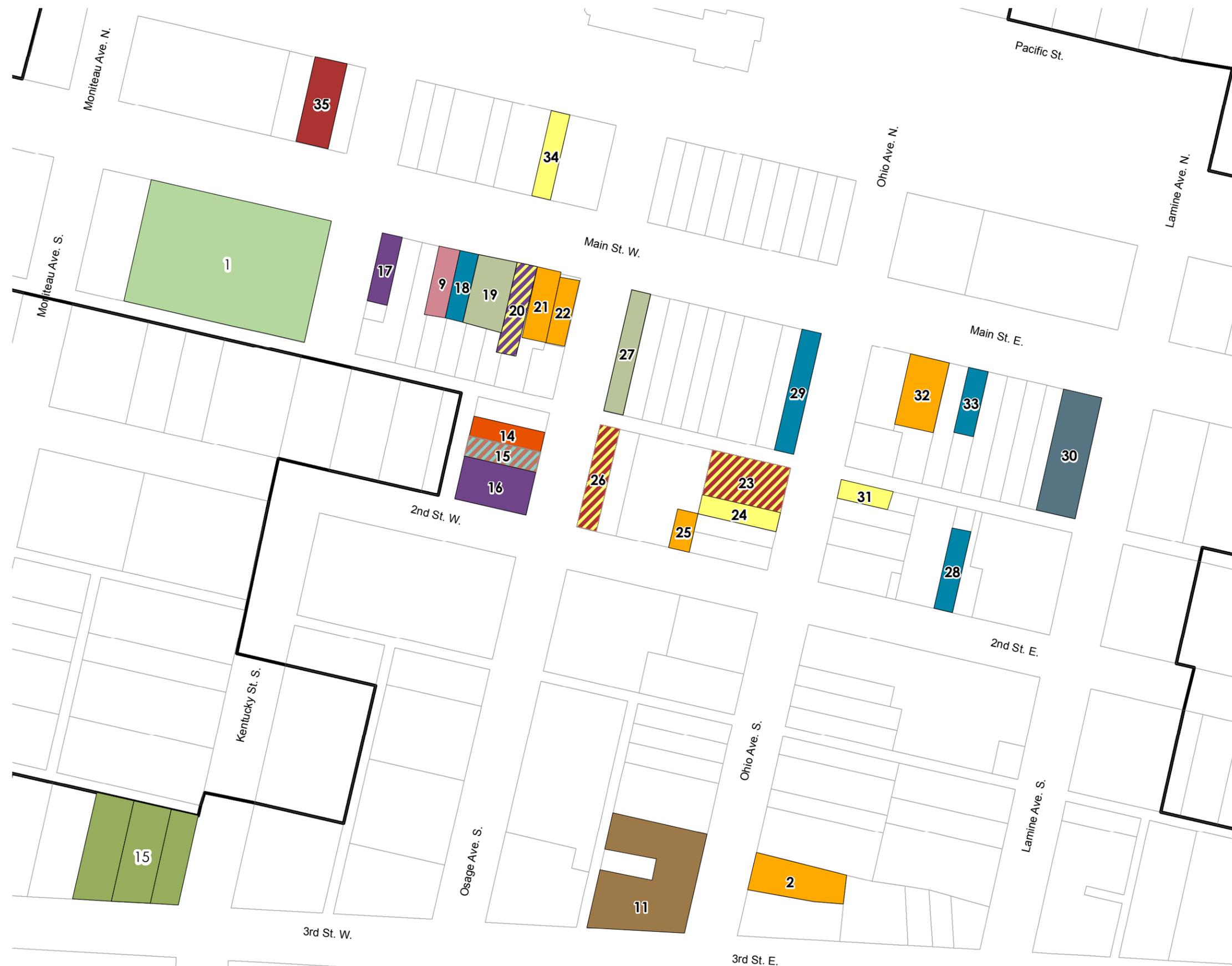
**Table 11: Potential Retail**

ID	Address	Available Sq.Ft.	Potential Retail
1	200 West Fourth	2,600	Florist
2	227 South Ohio	4,300	Full-Service Restaurant
3	100 East Broadway	29,000	Furniture & Home Furnishing Store
4	606 South Ohio	2,200	Specialty Grocery Store - Bakery
5	614 South Ohio	1,700	Full-Service Restaurant
6	506-510 South Ohio	1,000	Specialty Grocery Store - Candy Store
7	516 South Ohio	2,000	New Tea Room
8	307 South Ohio	2,100	Shoe Store
9	213 West Main	1,900	Jewelry Store
10	322 South Ohio	2,500	Salon & Spa
11	222-230 South Ohio	12,000	New Residential Development
12	302 West Third Street	1,400	New Surface Parking Lot
13	305 West Main	5,000	New Plaza & Farmer's Market
14	114 South Osage	1,939	Book & Periodical Store
15	116 South Osage	2,024	Wine & Liquor Store
16	120 South Osage	4,200	Stationery, Gift & Art Store
17	219 West Main	1,800	Stationery, Gift & Art Store
18	211 West Main	1,700	Clothing & Accessories
19	207 - 209 West Main	3,600	Home Furniture & Interior Decor
20	203 West Main	4,500	Specialty Food Store & Deli
22	201 West Main	1,900	Outdoor Seating
23	116 South Ohio	4,800	Electronic & Appliance Store
24	120 South Ohio	2,000	Art Gallery
25	110 West 2nd	1,000	Full-Service Restaurant - Sandwich Shop
26	120 West 2nd	2,700	Electronic Store
27	119 West Main	3,200	Home Furnishings - Art Glass Store
28	113 East Second	2,087	Clothing & Accessories - Children's
29	100 South Ohio	3,200	Clothing & Accessories
30	122-124 East Main	6,400	Grocery Store
31	115 South Ohio	1,300	Art Gallery
32	106 East Main	3,700	Full-Service Restaurant
33	112 East Main	1,700	Clothing & Accessories - Sporting Goods
34	206 West Main	2,100	Art Gallery
35	304 West Main	3,800	Commercial & Service

Figure 5 on Page 17 and 18 illustrates these potential retail uses in their geographic locations.

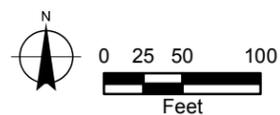
# Figure 5-a Retail Opportunity

Downtown Study Area  
City of Sedalia, Missouri



### Legend

-  Art Gallery
-  Book & Periodical Store
-  Clothing & Accesories
-  Commercial & Service
-  Electronic & Appliance Store
-  Full Service Restaurant
-  Grocery Store
-  Home Furnishings & Interior Decor
-  Jewelry Store
-  New Residential Development
-  Specialty Food Store
-  Stationery, Gift & Art Store
-  Wine & Liquor Store
-  New Plaza & Farmer's Market
-  New Park
-  City\_Parcels selection
-  Study Area



JULY 2009



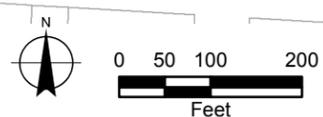


Figure 5-b  
Retail Opportunity  
Downtown Study Area  
City of Sedalia, Missouri



Legend

-  Florist
-  Full-Service Restaurant
-  Furniture & Home Furnishing Store
-  New Tea Room (In Progress)
-  Salon & Spa
-  Shoe Store
-  Specialty Grocery Store
-  Study Area





The recommendations listed in Table 11 and displayed in Figure 5 are based upon the analysis of unmet retail demand Table 9 (Retail Opportunities) on page 14. As previous noted, the total amount of available space and potential retail suggested in Tables 10 and 11 of 127,350 square feet is significantly less that the total supportable square footage in Table 9 of 343,217 at this time. If the 183,105 square feet in the “grocery” category is discounted at this time due to the proximity of Woods’ Grocery, the remaining retail opportunity is 160,112 square feet.

It is the recommendation of this report that the City and Sedalia Downtown Development, Inc. focus on other industry groups and not the “grocery” category. There may be some potential of that category, but the existing inventory should be adequate to focus on other unmet demand categories.

Table 12, below, shows how the current vacant space could be allocated and compares that allocation to supportable retail floor area.

**Table 12: Vacancy Allocation**

Industry Group	Opportunity <sup>1</sup>	Possible Retail Area (sq.ft.) Supported <sup>1</sup>	Allocated Vacant Space
Furniture Stores	\$ 2,579,507	31,846	29,000
Home Furnishing Stores	\$ 1,478,893	18,258	12,200
Electronics & Appliance Stores	\$ 1,100,614	13,588	7,500
Grocery Store	\$ 14,831,511	183,105	9,600
Specialty Food Store	\$ 273,299	3,374	3,500
Beer, Wine, & Liquor Stores	\$ 463,997	5,728	2,024
Clothing and Clothing Accessories Stores	\$ 2,073,870	25,603	8,687
Shoe	\$ 114,455	1,413	2,100
Jewelry, Luggage, and Leather Goods Stores	\$ 446,547	5,513	1,900
Book, Periodical, and Music Stores	\$ 1,181,874	14,591	1,939
Florists	\$ 244,503	3,019	2,600
Office Supplies, Stationery and Gift Stores	\$ 629,925	7,777	6,000
Used Merchandise Stores	\$ 320,288	3,954	-
Other Miscellaneous Store Retailers	\$ 169,823	2,097	2,500
Full-Service Restaurants <sup>3</sup>	\$ 3,502,667	23,351	13,700
Other Uses	-	-	24,100
<b>TOTAL</b>	<b>\$ 29,411,773</b>	<b>343,217</b>	<b>127,350</b>

<sup>1</sup> Indicates unmet consumer demand within the Secondary Trade Area.

<sup>2</sup> Based on \$81 in sales per square foot in Downtown Sedalia, based on existing retail inventory and activity.

<sup>3</sup> Based on \$150 per square foot in Restaurants Sales

The recommended vacant space allocation also includes an “other use” category that includes public and non-retail spaces, such as a plaza for a farmer’s market, dilapidated buildings or vacant lots that could be outdoor seating, the Commerce Building residential conversion, a park by the library, and other redevelopment opportunities. In a few places, non-retail businesses are proposed such as a high-end salon and day spa. It is important to include public and non-retail spaces in these recommendations because a vibrant Downtown requires a daytime population that will frequent its restaurants and shops.

## **Focus Groups and Telephone Survey Highlights**

The DREAM Community/Consumer Survey task for Sedalia included conducting focus groups and a telephone survey. Findings relevant to retail development are summarized below and offer another important source of data about local consumer behavior. The information offers some insight into local demand for additional retail, restaurant, and entertainment options.

### **Focus Groups Overview:**

- Many residents try to do their shopping in Sedalia, but have trouble finding certain specialty or high-end items in town, or have trouble finding adequate selection in town; they seek these out in Kansas City, Springfield, or online.
- Participants were interested in seeing specialty shops such as antique stores, a bookstore, a coffee shop, jewelry stores, and high-end clothing stores. All agreed that low-end flea-market type stores were not desirable.
- The groups felt that additional restaurants are needed to create a better variety in Downtown. Groups expressed concern over the operating hours of the existing restaurants, especially during large events such as the Missouri State Fair and Scott Joplin Ragtime Festival.
- Some groups focused on art related aspects. All groups agreed that more residents were needed in Downtown.
- The highest priority of all the groups had to do with the physical condition of Downtown. Buildings, streets, sewers, parking, landscaping, sidewalks, and green space were noted as important to make Downtown attractive to visitors.
- Attracting more retail and entertainment businesses and establishing a cohesive identity or theme for Downtown were also reported as element that will help make Downtown Sedalia a destination.

Telephone Survey Overview:

- About 73% of residents reported visiting Downtown at least once a month.
- A majority (61%) of these visits are for government/post office reasons. About 40% of visits were for shopping and 31% for dining.
- Respondents said top priorities for businesses in Downtown should be a department store and casual dining. Top improvements should be made to building façades and pedestrian-friendly improvements.
- 87% of respondents felt it was important to retain Sedalia’s historic character.

Figure 6 illustrates community responses gathered through the groups and survey for various categories of new retail, restaurant and entertainment businesses in Downtown (white spaces indicate that the category was not identified as a priority by that group).

**Figure 6: Retail Priorities**



Sedalia residents placed varying degrees of importance on several categories within the retail sector. The highest priority from the focus groups and community phone survey was upscale and causal dining.

## Key Consumer Segments

All aspects of a retail development program should consider the needs and desires of the customers, either existing or prospective. Several groups of consumers for Downtown Sedalia businesses should be given special attention because they represent the most likely consumers and represent significant purchasing power.

### Downtown Workers

- Most viable consumer segment with about 1,580 employees at 215 businesses.
- A key issue is understanding the potential spending capacity of Downtown workers. An estimate of this potential can be calculated as: 1,580 workers x \$25 estimated weekly spending = \$2,054,000 in annual retail sales.

### Local Residents

- Local residents visit Downtown for a variety of reasons.
- Key issues for this segment will be to inspire community loyalty through effective marketing and to create Downtown as a shopping option.

Additionally another key consumer segment is the Sedalia visitor. While this market was not surveyed by the community as part of the DREAM Initiative, it is very important to understand. It is recommended that the City and SDDI survey this market regularly at the City's large annual events. Some general assumptions about these visitors include:

### Out-of-Town Visitors

- Some of these travelers are overnight visitors while others are day-trippers.
- Hotels are currently located in the Primary Trade Area (City Limits), and one hotel is located Downtown.
- This segment can be quite lucrative based on expectation of increased patronage and their potential for expendable income.

## **DOWNTOWN SEDALIA GOALS & STRATEGIES**

The purpose of the DREAM retail market analysis is to establish a retail development strategy for Downtown Sedalia based on market realities. By understanding both how much residents spend in the various retail categories and how much of this spending is captured Downtown, local leaders can better focus retail development efforts. This analysis will also help potential retailers understand their likelihood of success in Downtown Sedalia.

There are opportunities for both existing and potential new retail businesses to attract more spending to Downtown Sedalia. A coordinated retail development strategy should be employed that will complement Downtown Sedalia's existing assets (attractions like the State Fair, Katy Trail, and Scott Joplin Ragtime Festival, presence of government and service employees, etc.) and reflect other unique local characteristics.

Because of Sedalia's active Downtown core and community support, some of the recommended strategies are ongoing efforts that can be strengthened or reaffirmed to local business owners and customers. Other strategies will present new ideas that will require discussion and additional planning. Some of the strategies are long-term projects that will not be realized immediately while others are short-term. Public and private sectors will need to partner to create an environment in which retail can thrive. This means municipal officials, staff, and private business and property owners need to cooperate in creative ways for the good of Downtown Sedalia.

### **GOALS**

The retail development strategy for Downtown Sedalia is presented within the framework of three general goals:

1. Build Downtown Residential Population
2. Enhance the Downtown Environment in General
3. Strengthen Existing Retail Businesses

## STRATEGIES

Strategies to achieve the noted goals are described in detail in the following pages. These strategies are realistic and based on an understanding of Downtown Sedalia's current retail market, its primary customers, and the spending potential of the key customer segments identified earlier in this analysis. The goals and their respective strategies are listed below.

### **Build Downtown Residential Population**

As noted in the DREAM Residential Demand Analysis, housing demand is strong across all sectors of the Sedalia residential market. Any housing developed should draw demand due to the shortage in supply. However, many existing upper-floor units are not maintained or underutilized. These units could also be brought on the market. The key to attracting new residents is to communicate that Downtown is a unique and vibrant living experience. Improvements such as parks and plazas will add to the Downtown quality of life.

The City should also market assistance programs such as the recent Missouri Home Repair Opportunity (HeRO) funding program to existing residents. Better maintenance of the existing housing surrounding Downtown will provide an enhanced route for visitors to Downtown and encourage more stable property values.

- ◆ **Promote current residential market successes.**

The success of projects such as the Furnell Landmarks Building should be promoted to Realtors and new developers as an example of private, high quality, upper floor residential units. Testimonials from Downtown residents should be included in all marketing and on the City's website. Sedalia Downtown Development, Inc. (SDDI) should put together Downtown living holiday tours.

The marketing materials produced can be effective in attracting residents from regional employment centers such as Whiteman Air Force Base. Military families can supply a good base of residents that enjoy the diversity of living Downtown. Another potential market for Downtown living are artists or similar businesses where the business can occupy the ground floor and the resident can live upstairs.

Continued assistance and encouragement to Downtown property owners that may consider converting their upper building floors into housing is critical. These property owners must also see that Downtown is a unique living opportunity which the City will support. The City investment will be represented through the enhanced streetscape and the creation of public spaces for residents.

These aspects can fit into a Downtown Residential Marketing Plan with the goal of increasing the density of Downtown's population. As more people choose to live Downtown, there will be more demand for nearby retail services.

◆ **Develop ongoing public enhancement plans.**

The streetscape plan currently under construction conveys an important message to the community and visitors that Downtown is important. As the streetscape construction continues and into the near future, the City of Sedalia and SDDI should reinforce this message by expanding the improvements to include amenities such as parks and plazas. Events that occur in these areas will appeal to Downtown residents and create a vibrant atmosphere for visitors. Development of green space was indicated as a problem in both the focus groups and telephone survey. An ongoing Downtown Work Plan, promoted to the neighborhood, will keep momentum and excitement for Downtown living. This annual plan should indicate additional elements or expansions of public property.

## **Enhance the Downtown Environment in General**

The current streetscape construction is providing aesthetic improvements to lighting, street furnishings, and sidewalks. Sedalia leaders can enhance residential demand and the overall Downtown retail environment through strategies focused on improvements to parking facilities, Downtown entryways, and wayfinding signage. Additionally, firm and fair code enforcement will improve building façades and conditions.

◆ **Improve existing parking lots**

Every focus group conducted by the DREAM Community and Consumer Survey indicated a problem with parking in Downtown, however the telephone survey respondents did not rank parking among the top issues. Factors that cause parking “problems” tend to be more oriented on the quality of the parking areas and the ease of location rather than the quantity of spaces available. This recommendation deals with improvements that the City can make to existing lots.

In general, the lots, particularly those accessed from Ohio Avenue, such as the one at 7th Street, should be included in the streetscape improvements. Pavement, curbing, lighting, furnishings, and landscaping should all be improved. The lots along Lamine and Osage should receive similar treatment, but should be oriented to attract the user to Ohio Avenue. All lots need to be clearly marked as available public parking. A parking lot with a few less spaces but more greenery will provide many benefits including:

- A less “vacant” feeling
- A more pleasant atmosphere for pedestrians to walk past and through
- An immediate welcoming and safe feeling from Downtown for visitors
- An open plaza in which to hold an event
- Potentially it can become a meeting place
- Improvements to stormwater runoff

◆ **Identify additional parking lots**

Although Downtown Sedalia has ample parking, the large City events periodically fill existing lots to capacity. With improvements and better access to the existing lots, the City may still find need to expand parking options. Potential areas for additional lots include the East 3rd Street to the Katy Depot and the area behind the Courthouse. The destinations of the Depot, Courthouse, and Bothwell Hotel also serve as event venues for the Scott Joplin Ragtime Festival. The long-range plan should be for the City to identify and acquire vacant property and buildings in these areas for the purpose of constructing quality parking.

◆ **Enhance Broadway & Ohio street entryway**

This is the core intersection whereby most visitors travel to Downtown Sedalia. Several residents during the focus groups and other DREAM meetings have pointed out that the intersection doesn't have enough design element to let travelers on Broadway know they have reached the turn for the historic section of Sedalia. Infill construction occupies three corners of the intersection with a stately church located on the fourth. There is an entry sign on the South side of Broadway, but it is not conspicuous and actually draws the eye away from the direction of Downtown.

Several design options could improve this intersection. The infill building on the northwest quadrant should be targeted for future acquisition and razed. The lot can be improved into a very welcoming plaza with a garden and gateway sign. Potentially a smaller park might be able to be constructed along an easement that could allow the building on the northwest corner to remain. Elements that could be included in this plaza include a monument of Scott Joplin and a Streetcar.

◆ **Implement wayfinding system**

The existing wayfinding system consists of banners and signs indicating pedestrian paths and public parking areas. While the existing system has attractive elements, success of a wayfinding system relies on more than signage. Aspects of scale, location, and contrast are critical. The existing signs are overshadowed by much of the other allowed signage in Downtown and are not placed at key locations.

The City and SDDI should cooperatively plan a system that begins with the gateway sign in the future plaza at Broadway and Ohio and draws a visitor along Ohio Avenue, pointing out attractions on the way. Important destinations include:

- Public Parking
- State Fairgrounds
- Future Community Center
- Liberty Center

- Courthouse
- Hotel Bothwell
- Carnegie and Public Libraries
- Future 3rd Street Trail
- City Hall
- Katy Depot
- Amtrak Station

◆ **Improve code enforcement**

The City of Sedalia struggles with a large amount of buildings. This is both an asset and a liability. The potential of these buildings can only be realized if the City leadership acts as good stewards to ensure proper care and rehabilitations occur in a timely manner. City codes seem to be adequate and the Code Enforcement Department consists of a Chief Official and three inspectors. Sedalia has an unsafe buildings ordinance, but could expand the criteria by which a building is declared unsafe and tie in lenders and insurers as contributors potentially liable for a building's maintenance. The City may want to maintain an unsafe/vacant building registry whereby the responsible party for a building is required to submit improvement or other plans when the building is vacant for a period of time. The codes also seem unwieldy and bulky on the side of property owner notifications for unsafe buildings. The City should consistently improve and tighten code standards for Downtown buildings. In the wake of the national mortgage crisis, more buildings are at risk of falling into disrepair and vacancy than ever before.

Sign codes also need to reflect the pedestrian nature of Downtown. Currently additional and excess signage is currently allowed that clutters Ohio Avenue. This situation makes every sign less effective. Additionally, several Downtown businesses paint the sides of their building with "murals" that are essentially advertisements for their business. Again, this is excess signage, not art nor displays of heritage. The City should review its sign code and procedures and consider implementing separate requirements for Downtown.

◆ **Implement building design guidelines**

Sedalia has a Local Historic District in place, but no guidelines are enforced. The mechanism of the preservation commission could easily be given the ability to implement guidelines for existing and new construction, including signage, in the District. The City should work with its legal counsel to adjust the applicable ordinances and draft building design guidelines.

The local preservation commission should champion the effort to apply for Certified Local Government status for Sedalia. This status can improve the City's grant eligibility and building design guidelines implementation.

City officials need to continue to support the Code Enforcement Department and the local preservation commission fully and find ways to empower the staff for implementation of the above efforts. Training, periodic procedural review, and comparison to similarly sized cities can yield ordinance adjustments and new efforts. The City needs to look beyond the typical health and safety issues and review properties for their contribution to Downtown's aesthetics. Private property owners need encouragement and education concerning building upkeep.

## **Strengthen Existing Retail Businesses**

Business owners have made major investments in the community by choosing to set up shop in Downtown Sedalia. Most businesses can improve profitability and draw more customers, which will benefit Downtown collectively. Many Downtown Sedalia businesses are small family-owned businesses that would likely benefit from assistance in learning more effective ways to increase sales and profit.

Despite the prevalence of highway-oriented "big box" chain retailers and strip centers in today's retail world, independent Downtown retailers have certain advantages. Downtown merchants and community leaders need to understand the psychology behind the consumer appeal of the local "Mom & Pop" store as opposed to the "Big Box" experience. Big Boxes offer a homogenous shopping experience that emphasizes the efficient purchase of necessities. This experience is designed to meet the customer's every need and keep them in the store. These factors allow Big Boxes to operate as stand-alone locations on the outskirts of town.

Unique local shops thrive when they can work together and become a destination as a group. City leadership needs to understand that the consumer will have to perceive the entire area as safe, clean, and friendly. Local shop owners need to understand that they will have to embrace visitors and make them feel comfortable. The consumer going to the local shop is there for the experience of the shop, not the efficiency of buying everyday items.

Some general ways that unique local shops can capitalize on their strengths include:

- Carry unique or higher-end items that can't be found elsewhere
- Learn to attract the dissatisfied customers from the larger retailers
- Offer expert, personalized assistance and extraordinary customer service
- Consider shopping amenities such as gift wrapping, free shipping, convenient return and exchange policies, recommendations to other local shops and restaurants, and special orders
- Work smarter by using technology and eliminating wasteful overhead
- Regularly strive to improve the customer satisfaction experience through a review in the context of a first-time visitor
- Advertise your unique qualities and services
- Retailers should implement a parking plan that requires employees to park away from the storefront, freeing up the most convenient on-street parking for customers

Downtown Sedalia merchants receive support from the City, SDDI, and the Chamber of Commerce. But the Downtown merchants must be made aware of their strengths and how to use them. The following retail strategies should be developed for Downtown, but will require cooperation from individual businesses.

Attraction of new businesses in sectors of unmet demand is also included in this goal. More retail activity is beneficial for all merchants and therefore strengthens the entire Downtown as a retail hub. Existing merchants will also need to understand this effect and learn to view a new business not as a potential competitor, but as a new partner in the overall Downtown market.

◆ **Downtown business owner education.**

The Sedalia Chamber of Commerce should cooperate with SDDI to develop business owner education seminars dealing with topics such as e-mail and web-based marketing, finding and retaining customers, tracking customer spending patterns, understanding customer needs, methods of increasing customer traffic, building and business maintenance, sales and profitability. Meetings should have a focus on Downtown retail businesses, but any local business could benefit.

A common problem noted by the focus groups and telephone survey respondents was that Downtown business hours were inconvenient. Business owners would advertise during big events, but were not available to event attendees after 5 pm. Information concerning retail opportunities as shown in Table 9 on page 14 should also be shared and Downtown merchants encouraged to adapt and expand their product lines to fulfill unmet demand.

◆ **Capitalize on Downtown's existing daytime population.**

As of 2008, there were 1,580 jobs in Downtown Sedalia. Downtown businesses should consider adapting to appeal to the needs of this market. Employees and visitors to the Pettis County Courthouse and other offices provide a ready source of potential customers for retailers and restaurants. Business owners should consider how they can attract those who may occasionally come Downtown for business to extend their trip to include a meal or shopping.

Some methods such as extending business hours, can be very appealing to this busy population and attract a customer before or after work or school. Business referral programs and promotions targeting Downtown employees could help to draw them back for longer visits. Restaurants that provide take-out, delivery, or special lunch promotions will appeal to the worker with limited time.

Small merchants can find it very difficult to stay open into evening hours, but having a critical mass of businesses open for shopping is vital for a vibrant, active Downtown. When there are shops open for browsing in the evening, the experience

of dining Downtown becomes a different experience than eating at a more highway-oriented business. Likewise, having more dining options and increased restaurant traffic will provide an incentive to retailers to stay open late.

A solution in many communities is to have one coordinated evening a week during which a group of businesses stay open late, such as Thursdays till 8:00 PM or Fridays till 9:00 PM. This can be advertised as part of Downtown promotions or shared advertizing among the retailers. Another coordinated evening or Saturday afternoon promotion may be a once-a-month event during which stores are open and a smaller-scale special event is planned to create a festive atmosphere.

◆ **Participate in marketing materials for Citywide visitors.**

Downtown needs to continue to participate in marketing to visitors of Citywide attractions such as the State Fairgrounds, Amtrak Station, and Katy Trail. Additionally, large events such as the Scott Joplin Ragtime Festival cannot be overlooked. Downtown Sedalia business stand to gain much sales activity with proper understanding of these large visitor markets. These events and locations are ideal to distribute materials with the message that Downtown is a compelling place to visit. It is imperative that promotional pieces for Downtown Sedalia are current. This is the opportunity for the Downtown to hook a visitor. Outdated information leaves a very poor impression.

◆ **Develop an Economic Development Plan to attract specific businesses in categories where unmet demand exists for that retail type.**

The City should target “General (Variety) Stores” and “Full Service Eating Places” for attraction to Downtown. While these types of retail services demonstrate the greatest opportunity to meet unmet demand, other services of note include “Special Food Services”, “Home Furnishing Stores”, “Shoe Stores”, “Clothing Stores”, “Grocery Stores”, “Electronics & Appliance Stores”, and “Book, Periodical, and Music Stores”. These potential uses should be carefully planned and considered for their effects on existing Downtown businesses.

◆ **Create a Retail Recruitment and Retention Team.**

SDDI should lead an effort to form a retail recruitment and retention team. This team will consider the specific retail uses that may meet unmet demand and work to improve the search network for businesses looking to relocate, expand, or start-up in Downtown. A potential source for the team to mine can be existing businesses ready to expand or successful businesses in nearby towns that may be interested in an additional location. Tools that should be used by the team include:

- A visitation schedule whereby regular meetings occur with City officials such as

the Mayor, and other Downtown leaders. A simple thirty-minute visit every few years can produce much loyalty and goodwill and identify Downtown business issues before they become critical problems.

- A listing of the available vacant buildings in Downtown Sedalia, including exterior photos, dimensions, listed rental rates, contact information, and building amenities. Listings should suggest the type of businesses for which the available space is best suited.
- ◆ A listing of local bankers, real estate agents, and representatives to ensure up-to-date property listings and to communicate accurate promotional information about Downtown.
- ◆ A brief description of any available incentives (e.g. grants, forgivable loans) for tenant improvements, and rent subsidies.
- ◆ Profiles of successful projects implemented by public/private partnerships and testimonials from successful newer businesses Downtown.
- ◆ A vacant storefront window filler package to include “retail opportunity” signs or promotions of successful businesses.

## CONCLUSIONS

The retail market for Downtown Sedalia has both opportunities and challenges. Downtown's greatest opportunity lies in developing its image as lifestyle center, attractive for shoppers and potential residents. Key markets among shoppers and potential residents seek the type of experience that Sedalia is poised to offer. The critical mass of existing businesses and institutions located Downtown and several large events provides a steady influx of potential shoppers. Potential residential markets include nearby military families and artists. A pleasant, historic, atmosphere that celebrates the City's diversity and heritage will create this appeal.

Occupancy rates for Downtown Sedalia are stable. However, potential retail opportunity exceeds existing Downtown vacant first-floor space. Downtown must develop ways to satisfy unmet demand by better utilization of existing retail space and by making more retail space available. The relative stability of Sedalia' economy demonstrates that the retail sector in Downtown Sedalia can continue to play an important role in the City's thriving market.

Capitalizing on the existing consumer base and growing the retail market will be challenging, yet possible. Downtown has a wealth of built infrastructure that enhances the pedestrian environment, as well as buildings with architectural and historical character. These characteristics, generally referred to as "new urbanism" or "lifestyle centers" are currently a major development trend in new shopping center designs all across the country. Sedalia should promote Downtown as an "experience" and a shopping and dining destination.

In order to develop this "experience" merchants will require encouragement and education. Outstanding customer service, convenient services and hours, and a clean and safe shopping environment are critical. These Downtown business changes, combined with a Downtown Residential Development Plan, a targeted economic development effort, and increased marketing initiatives will establish Downtown Sedalia as a pleasant shopping experience.

## APPENDIX

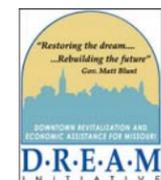
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# Exhibit 1 Boundary Map Downtown Study Area City of Sedalia, Missouri



## Legend

 Study Area Boundary



MARCH  
2008

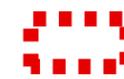


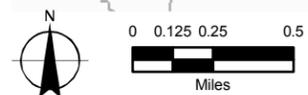
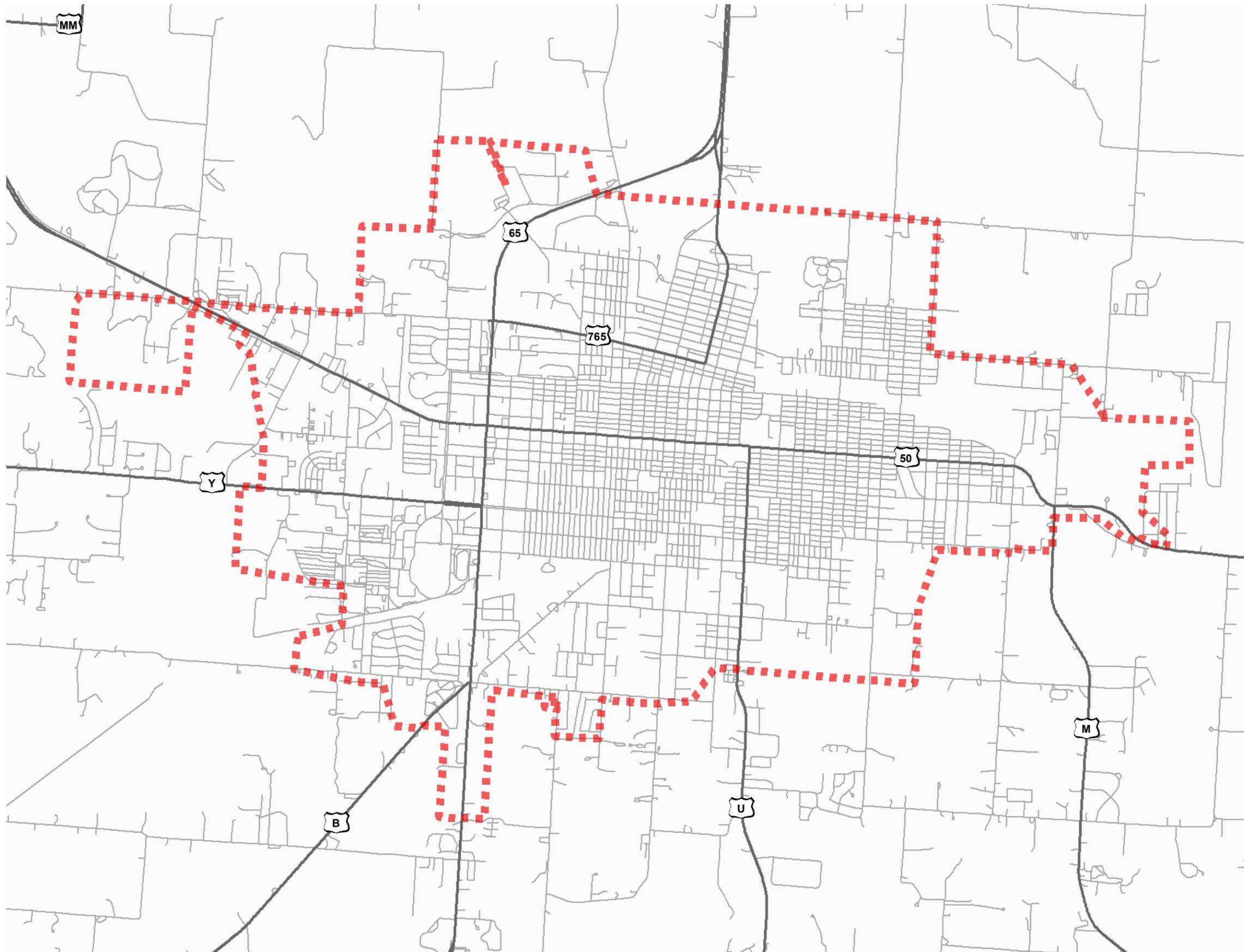


# Appendix A-2 Primary Trade Area

Downtown Study Area  
City of Sedalia, Missouri

### Legend

 Primary Trade Area

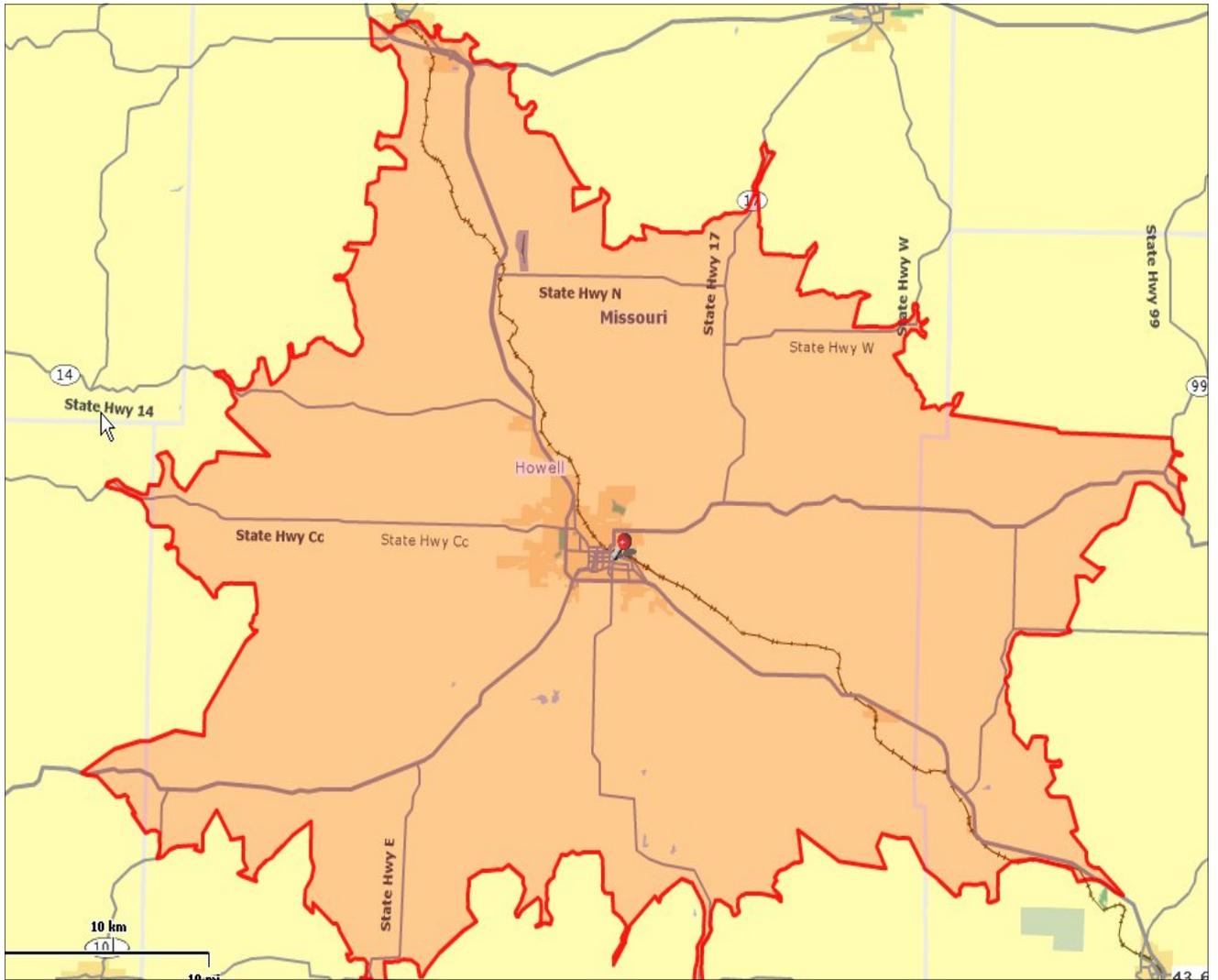


MAY 2009





**Appendix A-3  
Secondary Trade Area Illustration**





**Appendix B**  
**Downtown Trade Area Pull-Factor Summary**  
**Sedalia, MO**

Industry Group	Secondary Trade Area Demand	STA Businesses	STA Total Retail Sales	STA Gap	Potential Square Footage	STA Per Capita Demand	City Retail Demand	City Businesses	City Total Retail Sales	Downtown Total Retail Sales	Downtown Businesses	Downtown Trade Area Capture
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$232,504,459	328	\$213,804,110	\$ 18,700,349	231,280	4,552	\$94,935,165	240	\$180,511,426	\$16,494,618	44	3,623
Total Retail Trade (NAICS 44-45)	\$179,513,129	220	\$150,501,651	\$ 29,011,478	358,804	3,515	\$73,096,735	160	\$125,776,370	\$12,226,317	35	3,478
Total Food & Drink (NAICS 722)	\$52,991,330	108	\$63,302,459	\$ (10,311,129)	(127,525)	1,038	\$21,838,430	80	\$54,735,056	\$4,268,301	9	4,114
Furniture & Home Furnishings Stores (NAICS 442)	\$8,242,019	13	\$5,662,512	\$ 2,579,507	31,902	161	\$3,289,528	6	\$3,446,067	\$1,750,844	1	10,849
Furniture Stores (NAICS 4421)	\$6,483,195	9	\$5,004,302	\$ 1,478,893	18,290	127	\$2,624,119	5	\$3,390,608	\$1,750,844	1	13,792
Home Furnishings Stores (NAICS 4422)	\$1,758,824	4	\$658,210	\$ 1,100,614	13,612	34	\$665,409	1	\$55,459	\$0	0	0
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$8,738,235	11	\$4,356,066	\$ 4,382,169	54,197	171	\$3,571,333	10	\$3,897,658	\$110,494	1	646
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$13,342,038	29	\$19,245,251	\$ (5,903,213)	(73,009)	261	\$5,254,238	22	\$17,084,728	\$769,026	3	2,944
Building Material and Supplies Dealers (NAICS 4441)	\$12,356,243	20	\$17,604,480	\$ (5,248,237)	(64,908)	242	\$4,844,531	16	\$15,754,763	\$769,026	3	3,179
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$985,795	9	\$1,640,771	\$ (654,976)	(8,101)	19	\$409,707	6	\$1,329,965	\$0	0	0
Food & Beverage Stores (NAICS 445)	\$36,765,181	27	\$21,196,374	\$ 15,568,807	192,550	720	\$13,746,333	21	\$17,674,775	\$2,580,307	3	3,584
Grocery Stores (NAICS 4451)	\$34,271,504	17	\$19,439,993	\$ 14,831,511	183,431	671	\$12,603,043	14	\$16,196,628	\$2,075,678	0	3,093
Specialty Food Stores (NAICS 4452)	\$717,013	4	\$443,714	\$ 273,299	3,380	14	\$298,885	3	\$400,785	\$86,237	1	6,143
Beer, Wine, and Liquor Stores (NAICS 4453)	\$1,776,664	6	\$1,312,667	\$ 463,997	5,739	35	\$844,405	4	\$1,077,362	\$418,392	2	0
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$11,150,643	19	\$18,439,757	\$ (7,289,114)	(90,149)	218	\$4,584,081	18	\$10,836,094	\$542,269	1	2,484
Clothing and Clothing Accessories Stores (NAICS 448)	\$6,434,488	25	\$3,799,616	\$ 2,634,872	32,587	126	\$2,613,762	18	\$3,267,462	\$116,520	2	925
Clothing Stores (NAICS 4481)	\$4,023,914	17	\$1,950,044	\$ 2,073,870	25,649	79	\$1,641,860	10	\$1,453,523	\$47,006	1	597
Shoe Stores (NAICS 4482)	\$1,206,324	4	\$1,091,869	\$ 114,455	1,416	24	\$507,600	4	\$1,068,133	\$0	0	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$1,204,250	4	\$757,703	\$ 446,547	5,523	24	\$464,302	4	\$745,806	\$69,514	1	2,948
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$3,561,339	28	\$3,101,794	\$ 459,545	5,684	70	\$1,375,550	19	\$2,038,664	\$496,199	8	7,116
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$1,744,788	23	\$2,467,117	\$ (722,329)	(8,934)	34	\$710,033	15	\$1,499,490	\$309,902	6	9,071
Book, Periodical, and Music Stores (NAICS 4512)	\$1,816,551	5	\$634,677	\$ 1,181,874	14,617	36	\$665,517	4	\$539,174	\$186,297	2	5,238
General Merchandise Stores (NAICS 452)	\$85,855,302	17	\$70,640,936	\$ 15,214,366	188,166	1,681	\$36,531,979	13	\$64,255,251	\$5,102,256	3	3,035
Department Stores Excluding Leased Depts. (NAICS 4521)	\$43,992,431	6	\$35,903,826	\$ 8,088,605	100,037	861	\$18,168,842	4	\$35,031,260	\$0	0	0
Other General Merchandise Stores (NAICS 4529)	\$41,862,871	11	\$34,737,110	\$ 7,125,761	88,129	820	\$18,363,137	9	\$29,223,991	\$5,102,256	3	6,225
Miscellaneous Store Retailers (NAICS 453)	\$5,423,884	51	\$4,059,345	\$ 1,364,539	16,876	106	\$2,129,931	33	\$3,275,671	\$758,402	13	7,141
Florists (NAICS 4531)	\$712,283	7	\$467,780	\$ 244,503	3,024	14	\$244,871	2	\$278,457	\$99,446	1	7,130
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$1,878,742	13	\$1,248,817	\$ 629,925	7,791	37	\$719,394	7	\$1,019,726	\$131,913	3	3,586
Used Merchandise Stores (NAICS 4533)	\$704,604	13	\$384,316	\$ 320,288	3,961	14	\$263,991	11	\$328,509	\$155,860	5	11,297
Other Miscellaneous Store Retailers (NAICS 4539)	\$2,128,255	18	\$1,958,432	\$ 169,823	2,100	42	\$901,675	13	\$1,648,979	\$371,183	4	8,907
Food Services & Drinking Places (NAICS 722)	\$52,991,330	108	\$63,302,459	\$ (10,311,129)	(127,525)	1,038	\$21,838,430	80	\$54,735,056	\$4,268,301	9	4,114
Full-Service Restaurants (NAICS 7221)	\$20,187,153	53	\$16,684,486	\$ 3,502,667	43,320	395	\$9,950,433	39	\$14,973,278	\$641,109	3	1,622
Limited-Service Eating Places (NAICS 7222)	\$28,991,544	37	\$38,080,528	\$ (9,088,984)	(112,410)	568	\$10,920,043	32	\$35,451,162	\$1,612,472	2	2,841
Special Food Services (NAICS 7223)	\$1,607,162	6	\$4,776,069	\$ (3,168,907)	(39,192)	31	\$370,321	3	\$1,341,223	\$924,888	1	29,391
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$2,205,471	12	\$3,761,376	\$ (1,555,905)	(19,243)	43	\$597,633	6	\$2,969,393	\$1,089,832	3	25,237



# Appendix C-1 Retail Locations

Downtown Study Area  
City of Sedalia, Missouri



ID	Retail Name
1	Sarah Jones Boutique
2	Juanita's House Antiques
3	Jingles
4	Shampoo Hair Salon
5	Maple Leaf Antique Mall
6	Main Street Logo
7	Douglass Freed Art Studio
8	Dollar General
9	Open Door Thrift Store
10	Sam's Place Antiques
11	Jeans-N-More
12	Eddie's Drive-In
13	Rumors Ultra Lounge
14	Sassy Soda Shoppe
15	Osage Thrift Shop
16	Rumors Ultra Lounge
17	Rust n Thunder
18	Art Gallery
19	City Hall Emporium
20	Chez-When
21	Country Ruffle
22	Lets Dance Ballroom Dancing
23	Motorkite Rock Shop
24	Wilken Music
25	European Food Market
26	Club 208
27	The Pet Shop
28	The Cake Lady
29	Ivy Cottage Tea Room
30	Kay's Crafts
31	Kust-M Thunder
32	Nostalgia Vintage Cloths
33	Home Lumber Co.
34	Mr. Vinyls & Waunita's Salon
35	Swords Family Pharmacy
36	Coach's Sports Bar & Gril
37	The Shepherd's Place Christain Bookstore
38	Becca's Framing Antiques, Pro-Velo Cycle S
39	Lange Feeds
40	Total Look Salon
41	Queen City Electric, Perm
42	Sure Hits Indoor Boat & Golf
43	Art Impressions Art Galle
44	Copper Wolfe Ice Cream/Deli
45	Stereo Clinic
46	5th Street Brew Pub
47	Grandma's Treasures
48	McLaughlin Bros. Funeral
49	Downtown Antiques
50	State Fair Floral Co
51	Salvation Army Thrift Store
52	Conception Bridal & Boutique
53	Ohio Hair Company
54	House of Vacuums
55	Cecil's Cyclery
56	Chelsea's Antiques

**Legend**

- Retail
- Restaurant
- Study Area





# Appendix C-2 Retail Locations

Downtown Study Area  
City of Sedalia, Missouri



ID	Retail Name
1	Sarah Jones Boutique
2	Juanita's House Antiques
3	Jingles
4	Shampoo Hair Salon
5	Maple Leaf Antique Mall
6	Main Street Logo
7	Douglass Freed Art Studio
8	Dollar General
9	Open Door Thrift Store
10	Sam's Place Antiques
11	Jeans-N-More
12	Eddie's Drive-In
13	Rumors Ultra Lounge
14	Osage Thrift Shop
15	Sassy' Soda Shoppe
16	Art Gallery
17	City Hall Emporium
18	Chez-When
19	Country Ruffle
20	Lets Dance Ballroom Dancing
21	Motorkite Rock Shop
22	Wilken Music
23	European Food Market
24	Club 208
25	The Pet Shop
26	The Cake Lady
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34	Coach's Sports Bar & Grill
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38	Total Look Salon
39	Queen City Electric, Perm
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41	Art Impressions Art Gallery
42	Copper Wolfe Ice Cream/Deli
43	Stereo Clinic
44	5th Street Brew Pub
45	Grandma's Treasures
46	McLaughlin Bros.
47	Downtown Antiques
48	State Fair Floral Co
49	Salvation Army Thrift Store
50	Conception Bridal & Boutique
51	Ohio Hair Company
52	House of Vacuums
53	Cecil's Cyclery
54	Chelsea's Antiques
55	Ivory Grill





# Appendix D 1st Floor Vacancy Downtown Study Area City of Sedalia, Missouri

## Legend

- 1st Floor Vacancy
- Study Area





# Appendix E Parking Spaces

Downtown Study Area  
City of Sedalia, Missouri

## Legend

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- 6-10
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- 21-30
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- 50 or More
- Study Area





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