Clinton, Missouri

DOWNTOWN
REVITALIZATION &
ECONOMIC
ASSISTANCE FOR
MISSOURI

RETAIL MARKET ANALYSIS

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PGAVURBANCONSULTING

DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
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EXECUTIVE SUMMARY

The City of Clinton (the "City") is currently participating in the Downtown Revitalization and Economic Assistance for Missouri ("DREAM") Initiative, a three-year Downtown planning process. This process includes market research to determine the retail development potential of the DREAM Study Area. This report presents the market research and provides recommendations on retail development in Downtown Clinton.

Defining Downtown and its Retail Trade Areas

For the purpose of this report, three geographic areas are analyzed. First, "Downtown Clinton" is defined as the DREAM Study Area boundary. Downtown's Primary Trade Area (PTA) is defined as the Clinton City limits, which allows evaluation of the percentage of citywide retail sales that take place Downtown. The Secondary Trade Area (STA) is any point within a 30-minute drive of Downtown, an acceptable catch-basin of consumers likely to make a shopping trip to Downtown Clinton. The 30-minute drive time also represents a typical commute time for the Primary Trade Area's labor pool. A map of each area is included in Appendix IA

Key Demographic and Employment Data

Downtown's PTA has an estimated 2008 population of 9,345 people in 4,019 households. Average household income is $48,008 and the median age is 41. Approximately 24% of the population is 19 or younger; 29% are between 20 and 44; and 47% are over 45.

With a population of 18,697, the STA is roughly double that of the City. A total of 7,787 households are located in the STA. Age distribution and income profiles for the STA are similar to those for the City limits. The STA's average household income is $48,565. The median age is 43. About 23% of the population is 19 or younger; 29% of the population is between 20 and 44 years of age; 48% of the population is 45 years of age or more.

Approximately 5,800 jobs are located throughout the City, with 589 (12%) of those located in the Downtown Trade Area at 145 establishments. The retail sector employs 137 people (19% of total Downtown jobs), and 26 jobs are classified in the Food & Service Industry. There are a total of 44 retail or restaurant establishments Downtown, 8 of which are eating and drinking places.

Approximately 45% of Downtown employees reside within the City. The remainder of Downtown employees commute from surrounding towns such as Calhoun, Deepwater, Windsor and Warrensburg. An estimated 30% of Downtown employees commute from outside Henry County.

Retail Supply

Downtown currently has 700,000 square feet of first-floor commercial space. At the time of the DREAM Land Use and Building Inventory Survey (July 2008), approximately 210,000 square feet of first-floor space was used as retail or restaurant space and an additional 25,000 square feet was vacant. The 210,000 square feet of Retail/Restaurant Space is generating about $15 million in sales annually, or about $70 per square foot. The 25,000 square feet of vacancy represents, potentially, another $1.75 million in annual sales to the City. Using the North American Industrial Classification System (NAICS), "home improvement", "furniture & home furnishings" and "general retail" categorize most retail establishments in Downtown Clinton.

Retail Demand

Using proprietary retail spending data from ESRI (a leading provider of demographic information), the spending patterns of consumers residing in Downtown Clinton's Primary and Secondary Trade Areas can be analyzed. Consumers residing in the Primary Trade Area (PTA, which in this instance is coterminous with the City limits) spend an estimated $58 million per year, and the roughly 7,700 households within the Secondary Trade Area (STA) spend approximately $94 million per year on retail and restaurants. These retail expenditures can be broken down by category to learn, for example, that within the Secondary Trade Area, households spend $14 million per year at full-service restaurants and $3.7 million per year on electronics. This expenditure data is essential for understanding the potential for retail expansion in Downtown Clinton. Household income data and disposable income profiles are also analyzed to assess retail demand within the trade areas.

Market Analysis

Comparing consumer demand (i.e., total household spending) to actual sales within Downtown Clinton and the respective trade areas provides a key measure of the performance of the local retail sector. By analyzing this data for each retail category, one will begin to understand where "unmet" retail demand exists. For instance, households in the STA spend approximately $913,000 per year at shoe stores, but only about $279,000 of this spending takes place within the STA. Downtown Clinton captures the majority of the shoe-store spending that takes place in the STA, but the STA's consumers spend more than $600,000 per year outside the STA. 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 nine retail categories:

Electronics & Appliance Stores,
Lawn and Garden Equipment and Supplies Stores,
Beer, Wine, and Liquor Stores,
Clothing and Clothing Accessories Stores,

Shoe Stores,
Jewelry, Luggage, and Leather Goods Stores,
Book, Periodical, and Music Stores ,
Used Merchandise Stores, and
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 Clinton. For instance, approximately 8,300 square feet of electronics and appliance store retail space could be supported by unmet demand . The final step of the analysis involved matching existing vacant commercial space with suggested retail or restaurant categories.

In addition to the market analysis, survey and focus group results also help identify retail opportunities. The majority of phone survey respondents placed a high priority on adding three types of businesses Downtown—family or casual-style dining, clothing stores, and attractions aimed at teenagers such as an arcade or skating rink. Two key points of the focus groups are relevant to retail development and are consistent with phone survey data. First, many residents try to do their shopping in Clinton, but have trouble finding certain specialty or high-end items in town. Secondly, additional clothing stores and restaurants would be especially welcome additions Downtown.

Key Consumer Segments

Thinking about retail development in the context of key customer segments is helpful. Several specific considerations are offered for the following three target segments for Downtown Clinton: Downtown workers, local residents and tourists/out-of-town visitors. Understanding the spending potential of office workers is especially relevant to Downtown Clinton, which is home to the County Courthouse, City Hall and various professional offices.

Goals and Strategies for Retail Development

Based on the retail market data and the unique assets of Downtown Clinton, a set of retail development goals and strategies have been prepared. Outlined below are a series recommendations, which are discussed in more detail later in this report.

1. Strengthen existing Downtown retailers and restaurants:
    A. Provide technical assistance with marketing, promotions and customer service;
    B. Capitalize on Downtown employees and service users;
    C. Expand retailers' business hours; and
    D. Cooperatively cross-market, especially for "destinations."

2. Build Downtown Clinton's "brand" as a shopping & dining destination:
    A. Use existing special events as "brand awareness" opportunities;
    B. Add a recurring special event or promotion series;
    C. Engage advertising campaign with a wider geographic target;
    D. Capitalize on tourists and visitors; and
    E. Expand entertainment options.

3. Fill vacant spaces with new retailers or restaurants:
    A. Initiate a retail/restaurant recruitment campaign;
    B. Target businesses that complement Downtown's brand;
    C. Use market analysis and survey results as basis for recruiting; and
    D. Develop unique incentives tailored to retailers and restaurants.

4. Enhance the Downtown environment in general:
    A. Continue façade restoration and renovation;
    B. Encourage redevelopment and new construction that adds retail space;
    C. Think beyond the Square; and
    D. Support code enforcement and plan review efforts.

5. Gradually adjust business mix to increase proportion of retail.

INTRODUCTION

Clinton is fortunate to have a Downtown that is still the civic and social center of the City and region. The history of the City and the region is connected to Downtown Clinton. Downtown has several key local government facilities, numerous professional offices, churches, civic institutions, shops, offices and several restaurants. In summary, Downtown Clinton still matters for the City and the surrounding region.

In many instances, modern development trends have diminished the function of the typical American Downtown in everyday life, as shopping habits shifted to the big-box stores on the outskirts of town. Shopping centers and major retailers have located along major highways, as the automobile increased the mobility of the consumer. The auto-oriented retail centers have generally been outside of the traditional Downtown, which has resulted in a loss of commercial viability for Downtowns, including Clinton.

Though diminished as the commercial hub, Downtown Clinton currently enjoys relatively high occupancy rates, and its attractive historic Square has a favorable reputation in the region. One way to maintain and sustain Downtown's prominence is to encourage retail development and restore Downtown's function as a shopping hub. The Downtown environment must encourage people to come Downtown to shop, work and play.

Retail development is not the only necessary component for a successful Downtown, but it is one of the most important components and one of the most noticeable. Sustaining and growing the retail base will present many different challenges and opportunities. The Retail Market Analysis undertaken as part of the DREAM Initiative is an effort to identify the challenges and opportunities of retail development. To that end, this report presents valuable data and recommends strategies for strengthening Downtown Clinton's retail base.

The first part of the report will focus on the "supply" side of the retail market by considering the current inventory of retail space and existing retail businesses. This is followed by examination of the "demand" side of the retail market. This analysis reviews demographic trends and consumer spending patterns in the greater Clinton area. These two halves of the retail marketplace are then compared to identify the types of retail services that could be supported by existing "unmet" consumer demand. Finally the report will conclude with recommended strategies for encouraging retail development in Downtown Clinton and attracting the retail services identified in the market analysis and recent surveys of Clinton residents.

UNDERSTANDING RETAIL TRADE AREAS

"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's trade area would be much larger. To determine the trade area of a shopping center or entire retail district, an average must be used to even out differences between types of businesses. 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 often evaluates two different geographic trade areas: a Primary Trade Area (PTA) and a Secondary Trade Area (STA). For the purposes of this study, the PTA is the Clinton City limits. The STA will be any point within a 30-minute drive of Downtown. The 30-minute drive boundary presents an acceptable catch-basin of consumers likely to make a shopping trip to Downtown. The 30-minute drive-time also represents a typical commute time for the PTA's labor pool. A map of each area is included in Appendix A, and the three areas of analysis are summarized below.

- Downtown Clinton: The focus of the analysis is to determine the current level of retail activity captured by Downtown Clinton and the amount, if any, of additional retail activity that could be captured by Downtown Clinton. Downtown Clinton is defined as the DREAM Study Boundary, which is illustrated in the maps in the Appendix.

- Primary Trade Area: The City Limits. PGAV has classified the City of Clinton as the PTA because not only does Downtown Clinton draw many of its shoppers from the City, but also this study will show the relationship between Downtown retail activity and citywide retail activity.

- Secondary Trade Area: PGAV has defined the STA as a 30- minute drive-time "catch-basin" around Downtown Clinton. From this area, the City attracts approximately ninety to ninety-five percent (90%-95%) of all retail dollars.

DEMOGRAPHIC PROFILE

In order to understand the potential for retail development in Downtown Clinton, it is important to study the population and households in the respective trade areas. It is also important to know the household incomes and average annual expenditures of the households in the area. These statistics provides us with the number of consumers and an idea of the demand (the available spending dollars) for retail in each of the trade areas.

Because the national census is conducted decennially, the most current official population data is estimated based on the last census, which was conducted in 2000.

Downtown Clinton Statistics

Downtown (defined as the area within Clinton's DREAM boundary) is situated roughly in the center of the City and consists of approximately 200 buildings on 20 city blocks (see Figure 1). Before presenting data on the City as whole, some discussion of Downtown Clinton is useful.

Figure 1: Downtown Clinton

As of 2008, 112 people lived Downtown (defined as the Clinton DREAM boundary and adjacent blocks) in 43 households; with (2.6 persons per household). The average household income was $41,519. The median age is 34.7. Approximately 28% of the population were 19 or younger; 38% of the population were between 20 and 44 years of age; 36% of the population were 45 years of age or more.

Table 1: Downtown Clinton Demographic Trends

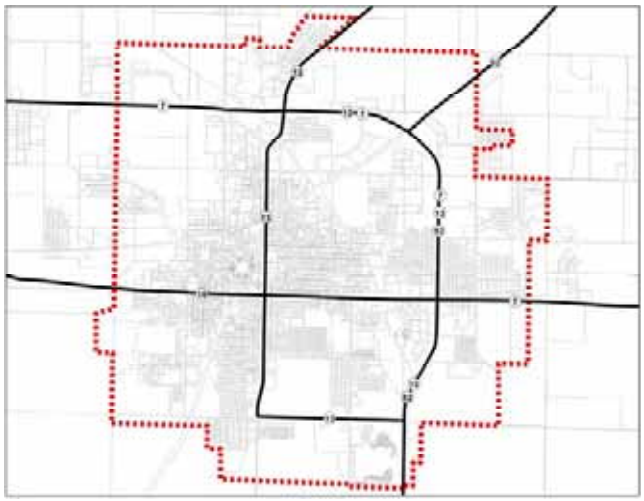
Year	2000	2008	2013	Percent Change 2000-2008	Percent Change 2008-2013
Total Population	113	112	113	-0.88%	0.89%
Total Households	43	43	43	0.00%	0.00%
19 and Under	30	31	29	1.12%	-4.44%
20-44	44	42	41	-3.61%	-3.21%
45 and Over	39	40	43	2.89%	6.74%
Median Age	36	34.7	35.6	-3.61%	2.59%
Average Household Income	$30,854	$41,519	$46,802	34.57%	12.72%

Primary Trade Area Statistics

As described in the previous section, the Primary Trade Area for the purpose of this analysis is the City limits of Clinton.

Currently, 9,345 people live in the Primary Trade Area (defined as the City of Clinton) in 4,019 households. The average household income is $48,008, and the median age of residents is 41. Approximately 24% of the population are 19 or younger; 29% of the population are between 20 and 44 years of age; and 47% of the population are 45 years of age or more.

Figure 2: Primary Trade Area



The following table illustrates, in further detail, current demographics and future demographic trends for the Primary Trade Area:

Table 2: Primary Trade Area Demographic Trends

Year	2000	2008	2013	Percent Change 2000-2008	Percent Change 2008-2013
Total Population	9,311	9,345	9,457	0.37%	1.20%
Total Households	3,978	4,019	4,080	1.03%	1.52%
19 and Under	2,430	2,215	2,203	-8.86%	-0.51%
20-44	2,961	2,747	2,809	-7.21%	2.23%
45 and Over	3,920	4,383	4,435	11.81%	1.20%
Median Age	39.6	41.0	42.4	3.54%	3.41%
Average Household Income	$40,054	$48,008	$54,893	19.86%	14.34%

Secondary Trade Area Statistics

As of 2008, the population of the Secondary Trade Area (STA) is 18,697 people living in 7,787 households. The average household income is $48,565. The median age is 43.1. About 23% of the population are 19 or younger; 29% of the population are between 20 and 44 years of age; 47% of the population are 45 years of age or more.

Table 3 provides further detail regarding current and projected demographics of the Secondary Trade Area:

Figure 3: Secondary Trade Area

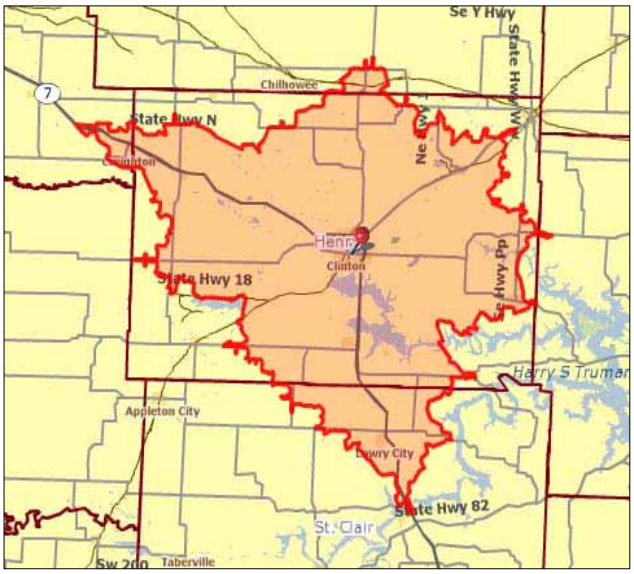


Table 3: Secondary Trade Area Demographic Trends

Year	2000	2008	2013	Percent Change 2000-2008	Percent Change 2008-2013
Total Population	18,049	18,697	19,212	3.59%	2.75%
Total Households	7,478	7,787	8,020	4.13%	2.99%
19 and Under	4,675	4,356	4,061	-6.81%	-6.78%
20-44	5,577	5,441	6,768	-2.44%	24.40%
45 and Over	7,815	8,881	9,025	13.64%	1.61%
Median Age	40.4	43.1	45.0	6.68%	4.41%
Average Household Income	$38,994	$48,565	$54,608	24.54%	12.44%

Employment

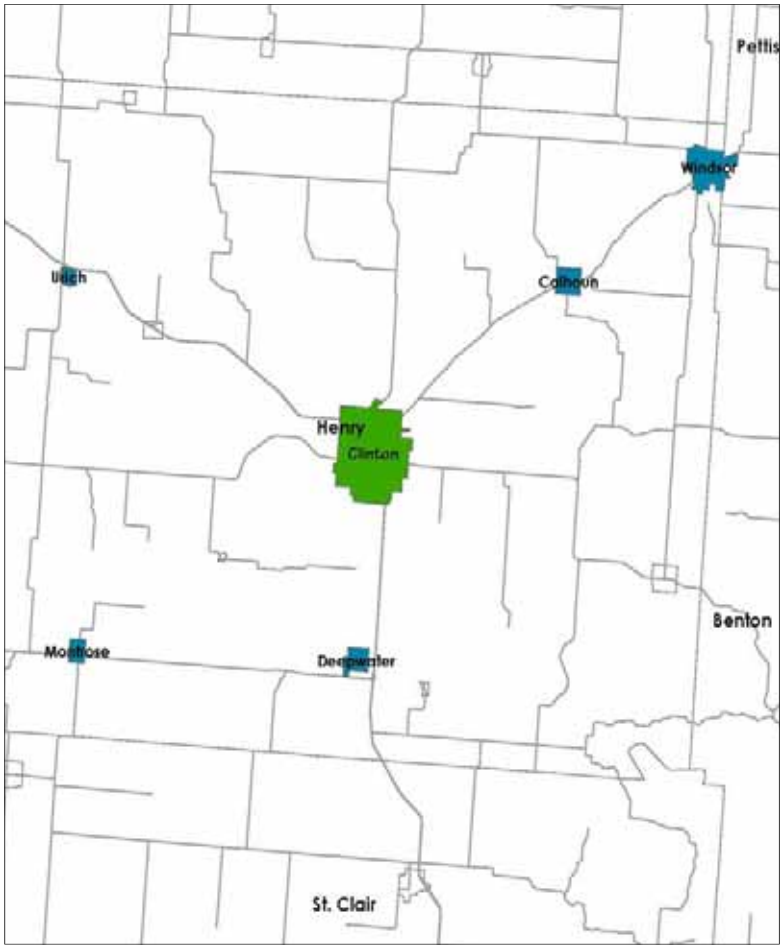
Throughout the City there are over 5,801 jobs, 689 of which are located in Downtown. Clinton's Downtown retail sector employs 19% (137 jobs) of the Downtown workforce, and 26 (4%) jobs are in the Food & Service Industry.

Downtown Clinton has a total of 145 employer establishments. Between the retail and food and service industry there are a combined 44 business establishments, of which 8 are restaurants. Most of the retail jobs located in Downtown are in the miscellaneous retailer category.

In the City as a whole, there are 1,699 retail and food and service industry jobs (29.3% of all jobs) and 175 establishments.

Approximately 45% of the Downtown employees reside in the City. A majority of Downtown Clinton's employees travel from the surrounding area, including the cities of Windsor, Deepwater, and Calhoun. Seventy percent of Downtown Clinton's employees live in Henry County. The location of nearby cities is illustrated in Figure 4.

Figure 4: Surrounding Communities



RETAIL SUPPLY

The Downtown Trade Area consists of 16 acres with 700,000 square feet of existing first-floor commercial/retail space. In reviewing the DREAM Land Use and Building Survey results, PGAV has determined that 210,000 square feet of this first-floor space is currently used as retail/restaurant space and another 46,200 square feet is vacant. The 210,000 square feet of retail/restaurant space is generating about $14.7 million in sales annually or about $70 per square foot. The 46,200 square feet of vacant space represents the potential for an additional $3.2 million in annual sales to the Downtown Trade Area.

Table 4, below, breaks down retail establishments in Downtown Clinton, the City of Clinton, and Henry County. Most retail establishments in Downtown Clinton are categorized as "Miscellaneous Retail." A map of the retail establishments is located in Appendix E.

Table 4: Retail Establishments

	Downtown Clinton		City of Clinton		Henry County	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
Retail Trade Summary	44	137	175	1,699	276	2,043
Home Improvement	7	19	15	57	29	104
General Merchandise Stores	2	4	8	341	11	347
Food Stores	2	6	11	303	19	368
Auto Dealers, Gas Stations, Auto Aftermarket	4	23	26	240	47	279
Apparel & Accessory Stores	4	12	10	25	13	40
Furniture & Home Furnishings	5	26	17	68	26	94
Eating & Drinking Places	8	26	42	521	62	601
Miscellaneous Retail	12	21	46	144	69	210
Total Businesses	145		663		1,208	
Total Employees	689		5,801		8,119	
Total Residential Population	112		9,345		22,745	
Daytime (Employee)/Nighttime (Population) Ratio	6.15		0.62		0.36	

During the Land Use, Building & Infrastructure Survey, PGAV inventoried thirty-seven (37) retail operations in Downtown Clinton. These retail services are listed in Table 5 on the next page and are organized according to the North American Industrial Classification System ("NAICS"). Using the NAICS system allows the report to compare retail activity by "sectors" or categories, so that the report can then recommend retail uses and establishments to fit any gaps in retail service. The following list gives the reader an idea of how the NAICS system classifies businesses.

Table 5: Existing Retail Supply

Industry Group	Store Name
Furniture & Home Furnishings Stores	Country Style Furniture
	Hobson Interiors
	Furniture City
Electronics & Appliance Stores	Alltel Wireless
Bldg Materials, Garden Equip. & Supply Stores	Creative Paints and Supply
	Sherwin Williams
Lawn and Garden Equipment and Supplies Stores	Wizard Landscape
Health & Personal Care Stores	Head Barber
	Quadstates Medical Rehab and Supply
	State Beauty Supply
Clothing and Clothing Accessories Stores	Yesterday's Costumes and More
	Nagel's Ladies & Juniors
Shoe Stores	Rhodes Boot Store
Jewelry, Luggage, and Leather Goods Stores	Glasscock Jewelry
	Time Jewelry
	Keit's Jewelry
Book, Periodical, and Music Stores	Blessed Life Bookstore
Miscellaneous Store Retailers	Family Video
	Dollar General
	Eberting's Main Street Central
Used Merchandise Stores	Kiddin Around Heirlooms
	Two Sisters Used Furniture
	Antiques on Nash
	Antiques on Washington
	White Rabbit Trading Co.
Food Services & Drinking Places	Huey's Deluxe
	Ben Franklin Coffee House
	News Room Bar and Grill
	Dans R Fine Foods
	Brennan's Old Fashioned Soda Fountain and Grill
	Main Street Café
	Square 109
	Pit Stop
	Den Dees
	Daylight Donuts
Auto Parts, Accessories, and Tire Stores	Valley Auto Parts
	O'Reilly Auto Parts

Downtown Clinton's primary retail competition is the Wal-Mart Supercenter-anchored retail area east of Downtown along the Highway 7/13 Bypass. Despite this competition, Downtown Clinton has significant retail strengths, some of which are described later in this report.

Retail areas in competing towns outside the Primary Trade Area, such as Sedalia and Warrensburg, also compete with Clinton for retail spending. Many households also travel a considerable distance to the Kansas City and Springfield metro areas for occasional shopping trips, specialized products or "special occasion" entertainment.

RETAIL DEMAND

The spending habits of the consumers in the three study areas are of great concern to this analysis because their spending habits provide the basis for the determination of demand. In short, determining 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

	Downtown Clinton	Secondary Trade Area
Average Household Income	$41,519	$46,802
Total Households	43	7,787
Average Annual Household Expenditures for Select Retail Sectors		
General Merchandise	$1,100	$1,325
Food	$4,917	$5,672
Food at Home	$2,882	$3,395
Food Away from Home	$891	$982
Apparel and Services	$1,329	$1,437
Household Merchandise	$1,203	$1,336
Electronics	$524	$545
Household Goods	$680	$791
Household Care	$218	$310
Transportation	$2,012	$2,555
Miscellaneous Merchandise	$1,199	$1,536
Health Care	$443	$628
Miscellaneous Goods	$756	$908
Entertainment & Recreation	$826	$926

The following tables depict Clinton's potential purchasing power. Table 7-A Household Income illustrates the numbers of households at regular income thresholds, giving the user a rough idea of the purchasing power available in Downtown Clinton, the City of Clinton, and Henry County.

Table 7-B Disposable Income clarifies this idea by showing the amount of disposable income, per household, for Downtown Clinton and the STA. This table presents the user with an idea of the volume of demand available within Downtown and the STA.

Table 7-A: Households by Income

Income Level	Downtown	Citywide	County
Total Households	43	4,019	9,484
$ 0 - $14,999	7	639	1,517
$ 15,000 - $24,999	9	772	1,527
$ 25,000 - $34,999	4	526	1,233
$ 35,000 - $49,999	10	760	1,717
$ 50,000 - $74,999	9	764	2,020
$ 75,000 - $99,999	3	273	835
$ 100,000 - $149,999	1	145	398
$ 150,000 - $199,999	0	76	123
$ 200,000 +	0	68	123

Table 7-B: Disposable Income Profiles

Disposable Income Level	Downtown Trade Area	Secondary Trade Area
Less than $15,000	9	1,487
$15,000-$24,999	12	1,494
$25,000-$34,999	11	1,291
$35,000-$49,999	13	1,584
$50,000-$74,999	8	1,393
$75,000-$99,999	1	231
$100,000-$149,999	1	216
$150,000-$199,999	0	52
$200,000+	0	66
Total	55	7,814
Median Disposable Income	$30,010	$31,474
Average Disposable Income	$34,591	$40,195

In determining the strengths and weaknesses of Downtown Clinton's retail market, this report uses data obtained from ESRI (a national, proprietary data service) to estimate the amount of retail demand captured by Downtown Clinton. This proprietary data allows the user to understand the total amount that all households in the respective trade areas spend on retail and restaurants (referred to as "demand"). This figure is then compared to the amount of retail spending that actually occurs in the trade area or in Downtown Clinton.

According to 2008 data provided in Table 8, all households in the STA spent an estimated $94.8 million on retail and food and drink. An estimated $121 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 $58 million, but more than $107 million (excluding auto sales, gasoline sales or non-store retail transactions) was spent within the PTA.

Table 8: Retail Demand & Sales

	Secondary Trade Area (STA)		Primary Trade Area (PTA)		Downtown
Industry Group	Retail Demand	Retail Sales	Retail Demand	Retail Sales	Retail Sales
Total Food & Drink	$20,481,372	$24,995,358	$20,481,372	$22,845,048	$1,876,256
Total Retail Trade	$74,350,706	$96,332,183	$37,539,731	$84,972,691	$12,893,115
Total Retail Trade and Food & Drink	$94,832,078	$121,327,541	$58,021,103	$107,817,739	$14,769,371

Of the $107.8 million spent in the City limits, Downtown captured approximately 14% of expenditures ($14.8 million), which also represents approximately 25% of City-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 Wal-Mart Supercenter. 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 much greater than the retail demand of City's households indicates that the City draws shoppers from the surrounding region. Between ninety and ninety-five percent (90%-95%) of retail spending in the City originates from within the Secondary Trade Area. The remaining retail spending is drawn from outside of this 30-minute drive-time catch-basin.

Unmet Demand

While, on the whole, 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 demand for goods that cannot be met in either trade area. Understanding this unmet demand will reveal opportunities for Downtown Clinton to capture more retail spending and add to the already significant "gravitational pull" of Clinton's retail sector.

In Table 9 unmet demand (the difference between retail demand and actual sales) is listed for nine retail categories. Given the total unmet retail demand within the Secondary Trade Area and the average sales per square foot in Downtown Clinton of $70 per square foot, PGAV estimates that Downtown Clinton could support an additional 62,250 square feet of retail by capturing the STA's unmet demand in the specified retail sectors. 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[1]	Possible Retail Area (sq.ft.) Supported[2]
Electronics & Appliance Stores	$ 581,776	8,300
Lawn and Garden Equipment and Supplies Stores	$ 64,069	900
Beer, Wine, and Liquor Stores	$ 557,493	8,000
Clothing and Clothing Accessories Stores	$ 106,731	1,500
Shoe Stores	$ 634,222	9,100
Jewelry, Luggage, and Leather Goods Stores	$ 104,778	1,500
Book, Periodical, and Music Stores	$ 304,835	4,400
Used Merchandise Stores	$ 45,476	650
Full-Service Restaurants[3]	$ 6,965,760	27,900
TOTAL	$ 9,365,140	62,250

[1] Indicates unmet consumer demand within the Secondary Trade Area.

[2] Based on $70 in sales per sq. ft. in Downtown Clinton, based on existing retail inventory and activity.

[3] Based on $250 per square foot in restaurants sales.

Available Retail Space Inventory

During the Land Use, Building and Infrastructure Survey task (July 2008), PGAV noted the following vacancies:

Table 10: Vacancies

ID	Address	Available Sq.Ft.
1	Green St at 2nd St	1,000
2	106 W Jefferson	1,600
3	108 N Washington	3,500
4	112 N Washington	4,000
5	116 W Grandriver	5,500
6	126 N Main	1,525
7	137 S Washington	1,000
8	206 W Jefferson	10,500
9	216 S Washington	3,250
10	218 S Center	2,975
11	227 S Washington	650
12	303 S Main	7,000
13	123 W Franklin	2,000
14	205 S Washington	1,700
TOTAL		46,200

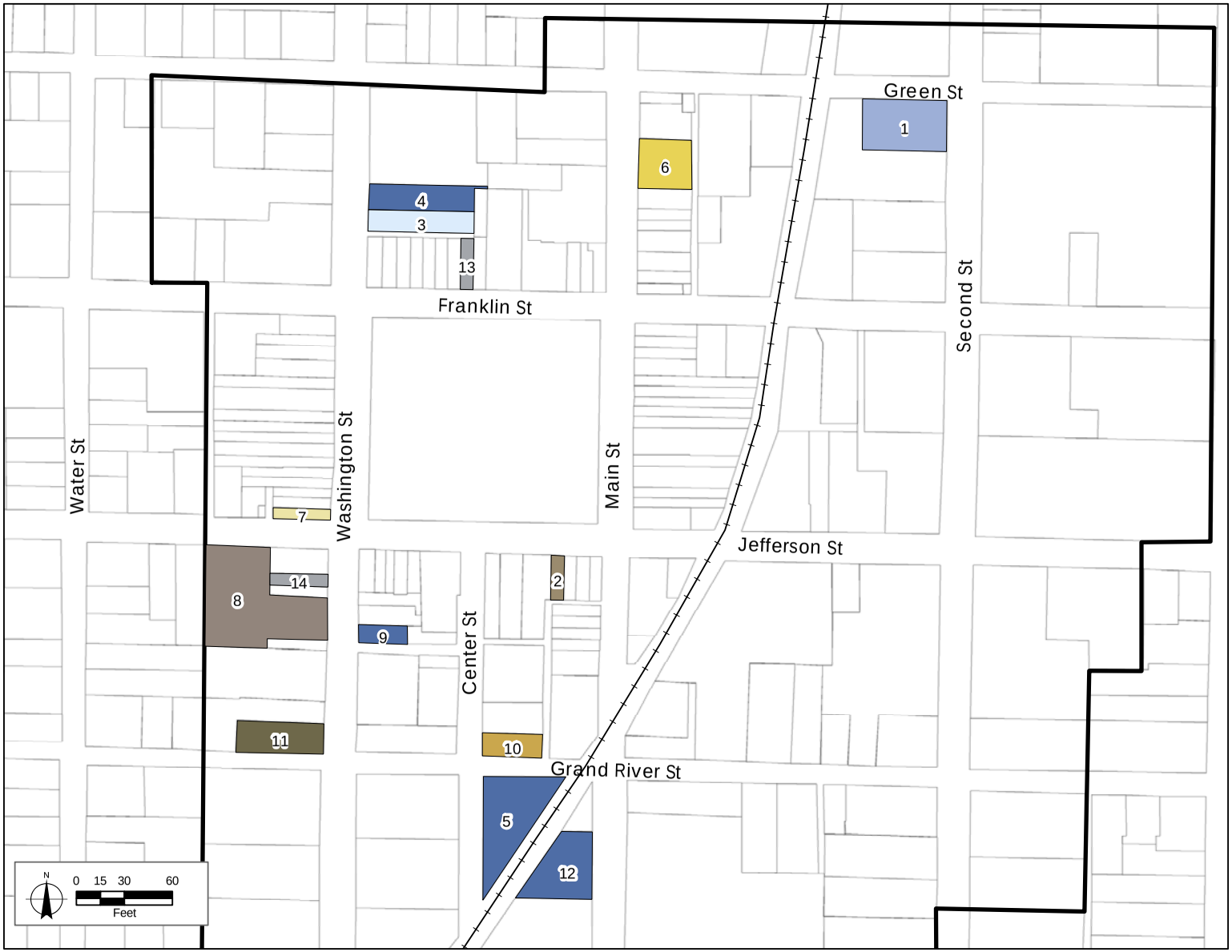
The above-listed locations are depicted on the First-Floor Vacancy map in Appendix D. The total available vacant square footage in Downtown Clinton is less than the amount of additional, supportable retail square footage as described on the previous page. Taking into consideration the retail opportunities described above, the size of each vacant space, and the location of each in Downtown Clinton, potential retail spaces can be matched with suggested retail services. The map (Figure 5) on the following page identifies the potential retail uses in their actual locations.

Table 11: Potential Retail

ID	Address	Available Sq.Ft.	Potential Retail
1	Green St at 2nd St	1,000	Food, Beverage & Convience Retail
2	106 W Jefferson	1,600	Wine shop, Specialty Food Store
3	108 N Washington	3,500	Electronics, Appliance Store
4	112 N Washington	4,000	Full-Service Restaurant
5	116 W Grandriver	5,500	Full-Service Restaurant
6	126 N Main	1,525	Speciality Retail
7	137 S Washington	1,000	Clothing Store
8	206 W Jefferson	10,500	Multiple Storefronts/Uses: Electronics, Books, Dining, Office Space
9	216 S Washington	3,250	Full-Service Restaurant
10	218 S Center	2,975	Book, Periodical, or Music Store
11	227 S Washington	650	Used Merchandise Store
12	303 S Main	7,000	Full-Service Restaurant
13	123 W Franklin	2,000	Shoe Store
14	205 S Washington	1,700	Shoe Store
TOTAL		46,200	

Figure 5
Retail Opportunity
Downtown Clinton

Downtown Study Area
City of Clinton, Missouri



Legend

- Book, Periodical, or Music Store
- Clothing Store
- Electronics, Appliance Store
- Food, Beverage & Convience Retail
- Full-Service Restaurant
- Multiple Uses
- Shoe Store
- Speciality Retail
- Used Merchandise Store
- Wine shop, Specialty Food Store
- Study Area

Ist Floor Vacany and Land Use were identified during the Land Use Survey conducted in July of 2008.

The labels for the retail opportunities correlate with Table 8: Retail Opportunities

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The recommendations listed in Table 11 and displayed in Figure 5 are based upon the analysis of unmet retail demand Table 9. The total amount of available space and potential retail suggested in Table 11 (46,200 square feet) is well within the total supportable square footage in Table 9. Table 12, below, shows how the vacant space could be allocated and compares that allocation to supportable retail floor area.

Table 12: Vacancy Allocation

Industry Group	Allocated Vacant Space	Possible Retail Area (sq.ft.) Supported[1]
Office	7,855	
Electronics & Appliance Stores	4,375	8,300
Lawn and Garden Equipment and Supplies Stores	0	900
Beer, Wine, and Liquor Stores	2,600	8,000
Clothing and Clothing Accessories Stores	1,000	1,500
Shoe Stores	3,700	9,100
Jewelry, Luggage, and Leather Goods Stores	1,525	1,500
Book, Periodical, and Music Stores	3,850	4,400
Used Merchandise Stores	650	650
Full-Service Restaurants[2]	20,645	27,900
TOTAL	46,200	62,250

[1] Based on $70 in sales per sq. ft. in Downtown Clinton, based on existing retail inventory and activity.

[2] Based on $250 per square foot in Restaurants Sales

A significant portion of the recommended vacant space allocation is recommended for Full-Service Restaurant, since much of the total unmet demand lies in this category. The recommended "allocation" of floor area by retail sector in Table 12 assumes that Downtown retailers or restaurants would not be able to capture all of the unmet retail or restaurant demand, but approximately 60% of unmet demand. Though challenging, a comprehensive retail development program for Downtown Clinton can make Downtown a more vibrant and competitive retail district capable of capturing a greater share of total STA retail and restaurant expenditures.

The recommended vacant space allocation also includes a limited degree of office use. The reason for including office space with these recommendations is based on the understanding that a vibrant Downtown requires a daytime population that will frequent its restaurants and shops. Attracting office users to Downtown Clinton would naturally increase the daytime population and bring more customers Downtown.

Focus Groups and Phone Survey Highlights

Telephone surveys and focus groups were conducted as part of the DREAM planning process. Survey and focus group findings relevant to retail development are summarized in the following section. The survey and focus group results offer another important source of data about local consumer behavior and measures the desire for additional retail, restaurant and entertainment offerings in Downtown Clinton.

Telephone Survey Overview

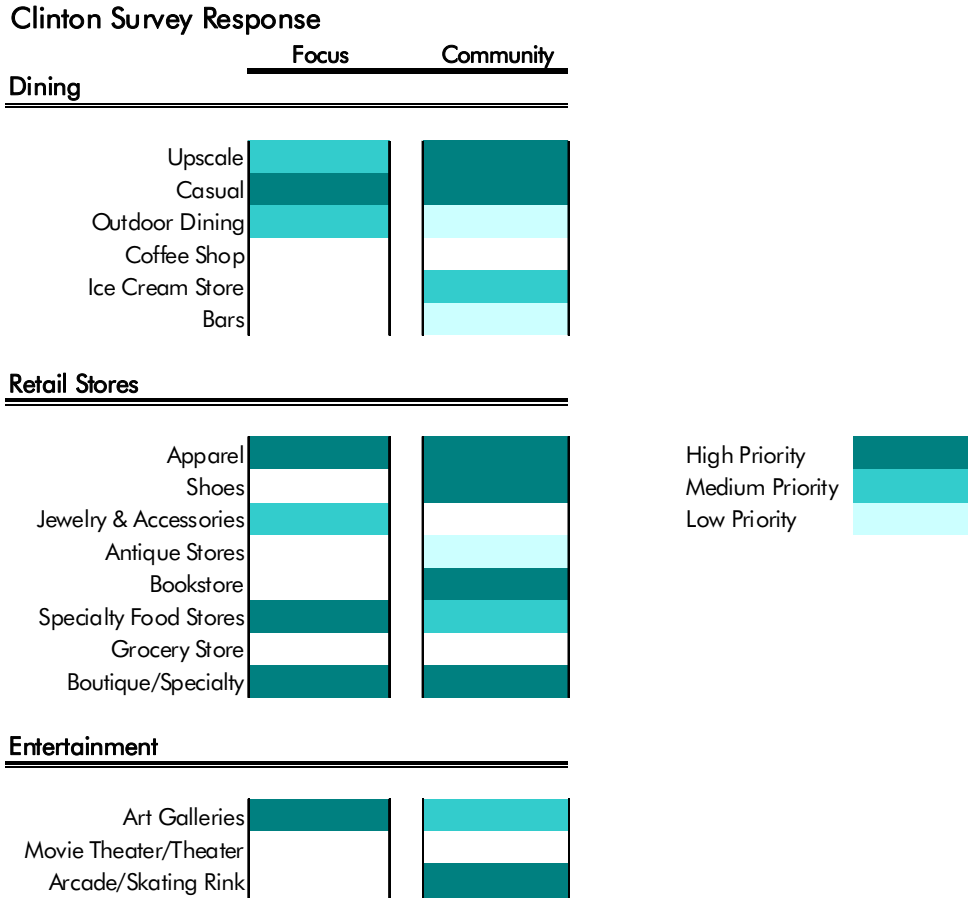
- Downtown Visits
  - More than 50% of residents in Clinton visit Downtown more than five times a month
  - Another 35% visit Downtown one to five times a month
- Activities when Visiting Downtown
  - A majority of visits to Downtown are focused around conducting business (29%) and trips to the post office and local government (16%)
  - Approximately 24% of visits are centered around shopping while another 13% are focused on dining

Focus Group Overview

- Many residents try to do their shopping in Clinton, 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.
- Downtown Clinton should focus on independently owned specialty type shops and restaurants rather than large chains; the participants felt that Downtown's purpose is not to compete with large chains, but to offer a unique experience to customers.
- Additional apparel businesses (men's, women's and children's clothing), shoe stores, and jewelry stores would be welcome additions.
- The community would welcome additional restaurants, including fine dining, Italian food, a wine lounge or beer garden, and a variety of casual dining options, all with later business hours and possibly outdoor seating.
- In other types of businesses, the community would welcome a bookstore, a coffee shop, a meat shop (market), a small grocery store, a sporting goods store, and any other specialty shops.
- Attracting retail and entertainment businesses should be the highest priority for Downtown Clinton, and all other improvements should work towards achieving this priority.

Figure 6 illustrates survey and focus group participant preferences 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



Clinton Residents placed varying degrees of importance on several categories within the retail sector. The highest priority from the focus group and community phone survey was casual dining, apparel stores and boutique/specialty shops. The community also indicated that attracting a bookstore, shoe store and fine dining establishments should be a top priority. The focus groups felt the highest priority should be placed on specialty food stores and art galleries. The community also places a high priority on activities and attractions aimed at teenagers.

In summary, focus group participants and phone survey respondents were both very much interested in a wider variety of retail establishments, with extended business hours and an environment that focuses on the customer and their experience.

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 Clinton businesses should be given special attention because of they represent the most likely consumers and represent significant purchasing power.

Downtown Workers

- Most viable consumer segment with more than 689 employees and 145 businesses
- A key issue is understanding the spending capacity of office workers

  An estimate of this potential:

  - 689 x $25 estimated weekly spending = $894,700 annually

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

Tourists - Out of Town Visitors

- Some of these travelers are overnight visitors while others are day trippers.
- Hotels are located in the STA and this limits the ability for the Downtown Trade Area to attract these visitors.
- This segment can be quite lucrative based on expectation of increased patronage and their potential for expendable income.

DOWNTOWN CLINTON GOALS & STRATEGIES

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

Clearly there are opportunities for both existing and potential new retail businesses to attract more spending to Downtown Clinton and make Downtown a more vibrant place. To take advantage of this opportunity, a coordinated retail development strategy should be employed. This strategy should complement Downtown Clinton's existing assets (the presence of government and service employees, a relatively healthy occupancy rate, convenient parking on the Square, several long-established retailers with loyal customers, etc.), and reflect other unique local characteristics.

Because of Clinton's active Main Street program and the community's longstanding support of Downtown, some of the recommended strategies are ongoing activities that can be strengthened or simply reaffirmed as worthwhile endeavors. Other goals or strategies will offer new ideas that will require considerable discussion and additional planning. Some strategies are long-term projects that will only be fully realized after years of effort from various groups and individuals. Retail development, and Downtown revitalization in general, is a long-range endeavor, and one that requires support from many sources—retailers, property owners, Main Street, the City, civic groups and the general public.

GOALS

The retail development strategy for Downtown Clinton is presented within the framework of five general goals:

1. Strengthen existing Downtown retailers and restaurants
2. Build Downtown Clinton's "brand" as a shopping & dining destination
3. Fill vacant spaces with new retailers or restaurants
4. Enhance the Downtown environment in general
5. Gradually adjust business mix to increase proportion of retail

STRATEGIES

Strategies to achieve these goals are described in detail in the following pages. Strategies must be realistic, and they should be based on an understanding of Downtown Clinton's current retail market, its primary customers, and the spending potential of the key customer segments identified earlier in this analysis.

Re-energizing downtown retail can be a difficult, lengthy and complicated process. Traditional downtowns have changed dramatically in the past decades due to changes in lifestyles, consumer spending patterns, merchandising, and heightened competition for retail and restaurant spending. To achieve long-term success Downtown Clinton stakeholders must understand these changes and be willing to embrace new approaches to retail development.

Strengthen Existing Retailers and Restaurants

The owners of existing businesses in Downtown Clinton have made major investments in the community. Some are thriving and others are less successful. Regardless, all businesses can improve their profitability and draw more customers, which will benefit Downtown collectively. Clinton Main Street and other local organizations support Downtown businesses in a number of ways, but achieving the following objectives will require cooperation from individual businesses.

- *Provide technical assistance with marketing, promotions and customer service*

  Many of Downtown Clinton's businesses are small family-owned businesses and would likely benefit from assistance in learning more effective ways to increase sales and profit. Whether through workshops, print materials or one-on-one mentoring, retailers should be offered training on such topics as e-mail and web-based marketing, finding potential customers, retaining existing customers with loyalty and referral programs, tracking customer spending patterns, and methods of increasing customer traffic, sales and profitability.

  Despite the prevalence of highway-oriented "big box" chain retailers and strip centers in today's retail world, independent Downtown retailers have certain advantages. It is important for a Downtown merchant and community leadership 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 safe, homogenous shopping experience that emphasizes the efficient purchase of necessities. Everything from the perception of parking availability to the availability of snacks is designed to meet the customer's every need and to 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 to create a critical mass 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. Clinton Main Street or individual retailers are encouraged to critically evaluate each retail property from the perspective of a potential customer. The "Existing Store Checklist" included with this report as Appendix F is a tool to help examine and improve the shopping experience at Downtown Clinton retailers.

To effectively compete with local strip commercial centers and big box retailers, Downtown Clinton must continue to convey an image and comfort level that welcomes shoppers, diners and casual visitors. Downtown's unique ambiance is largely a result of its historic architecture. Because they help protect Downtown's special character, design standards must be applied to buildings both on and off the Square. The successful application of these guidelines requires the continued cooperation and commitment of all business and property owners in Downtown to consider recommendations in making building, façade and site improvements.

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

- Carry the unique or higher-end items that can't be found elsewhere.
- Learn how to attract the dissatisfied customers from the larger retailers.
- Offer expert, personalized assistance and extraordinary customer service.
- Consider shopping amenities like gift wrapping, free shipping, convenient return and exchange policies, recommendations to other area shops and restaurants, and special orders.
- Work smarter by using technology and eliminating wasteful overhead.
- Think like your first-time customer walking into your store, ask yourself, "What can improve?"
- Advertise your unique qualities and services.
- Individual 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.

- *Capitalize on Downtown employees and service users*

Employees and visitors to the Henry County courthouse, City Hall, law offices and other offices provide a ready source of potential customers for retailers and restaurants. Businesses should make special efforts to draw these customers and use them as a source of referrals. Special promotions targeting Downtown employees could help to draw them back for longer visits on evenings and weekends. Retailers and restaurant owners should consider how they can attract those who may occasionally come Downtown for courthouse or other business to extend their trip to include a restaurant meal or shopping.

- *Expand retailer's business hours.*

  Small merchants can find it very difficult to stay open into evening hours, but having a critical mass of businesses open for shopping can transform a Downtown into a vibrant, active area. One study finds that 70% of all sales occurs after 5:30 p.m. and on weekends. 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.

  One solution in many communities is to have one coordinated evening a week during which a group of businesses stay open late (e.g. 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 (for instance, the first Friday or second Saturday of the month) during which time stores are open and a smaller-scale special event is planned (e.g. outdoor live music, sidewalk sales, coupon event) to create a festive atmosphere and special occasion.

- *Cooperatively cross-market, especially for "destinations."*

  Some businesses draw customers from a wider geographic area than others. Those shops and restaurants that draw from farther away represent an opportunity for Clinton to capture more retail spending. Whether through flyers, coupons or just casual word-of-mouth recommendations, store and restaurant employees should encourage their customers to visit other shops Downtown. Some customers will not be aware of the other opportunities to shop or dine Downtown. For this reason, Downtown business directories should always be on hand at check-out counters and waiting areas in businesses.

  Shared advertising (e.g. newspaper ads promoting multiple businesses) can be beneficial for Downtown businesses for several reasons. Whether print or electronic media, shared ads promoting multiple businesses help build an image of Downtown as a place with multiple shopping opportunities, leading to multiple-store shopping visits. It can also make advertising more affordable and allow smaller businesses to use advertising media they would not otherwise use. Downtown cross-promotion efforts could be expanded to include businesses located elsewhere in Clinton, especially those businesses that might draw customers or visitors from a wider geographic area.

Build Downtown Clinton's "Brand" as a Destination for Shopping and Dining

Downtown Clinton is perceived in a favorable light, as reflected in recent focus groups and a telephone survey conducted as part of the DREAM program. However, there is an opportunity to increase the number of people from Downtown's secondary trade area (and beyond) who shop or dine Downtown. To draw more of these potential visitors, stakeholders should work to improve public awareness of shopping and dining opportunities and gradually build a "brand" or image of Downtown Clinton as an attractive and authentic place to spend time browsing shops, enjoying a meal, getting personal attention from retailers and finding unique items. To be most effective, marketing and promotional activities should focus on the specific consumer segments identified in the market analysis.

- *Use existing special events as "brand awareness" opportunities.*

  Several popular events are held in the Downtown Square, and some of those attending would not otherwise come to Downtown for shopping. Events like "Olde Glory Days" and "Cruise Nights" provide an opportunity for businesses to reach new customers. Issuing special coupons only available at the event or conducting promotions like "Olde Glory Days Window Treasure Hunt" encourage newcomers to visit retailers and help bring people back Downtown during non-event times. Advertising about the upcoming events should specifically mention opportunities to shop and enjoy restaurants.

- *Add a recurring special event or promotion series.*

  Special events and promotions attract various types of visitors and expand awareness of Downtown's retail environment. New ideas for events and promotions should continually be evaluated. One suggestion from the telephone survey is a farmer's market, which could be hosted in the Downtown Square on a weekly or bi-weekly basis. Evening or weekend events also give retailers an incentive to extend business hours.

  Some events may be more explicitly related to business promotion. Having an event specifically geared to promote restaurants (e.g. "A Taste of Downtown Clinton"), could help promote the Downtown as a destination for dining. A "home improvement expo" could promote the Downtown paint, home décor, and furniture retailers. Regardless of the event, retailers must be involved in the planning process to ensure that retail attraction and business development is a major part of the event's purpose.

- *Engage advertising campaigns with a wider geographic target.*

  Because of its proximity to attractions with a regional draw (e.g. Truman Lake and the Katy Trail), there are considerable opportunities to expand awareness of Downtown Clinton beyond the STA (30-minute drive time). Press releases about special events, cooperative advertising and other communication should be strategically targeted to media in outlying markets within a suitable range for day-

trips, (Kansas City, Columbia, Springfield, etc.). Eventually, this promotional campaign could be extended to direct mail, e-mail marketing or other means.

- *Capitalize on tourists and visitors.*

  Downtown business guides and retailer/restaurant profiles should be available and prominently included anywhere Clinton tourism information is available, whether on-line or at welcome centers. Specific promotions in partnership with events at the Benson Convention & Exposition Center could include raffles of gift items from Downtown, handing out business guides or offering guided tours of the Square. Clinton's hotels should be targeted as partners for Downtown promotion. This can be as simple as making sure that front-desk employees know about Downtown shopping and dining options and can give visitors clear directions to the Square. Coupon or special offers for out-of-town customers could also be offered to hotel guests at check-in.

- *Expand entertainment options*

  In the recent telephone survey of Clinton residents, "entertainment options" was one of the few characteristics of Downtown that received more negative than positive ratings. Participants also felt that adding attractions aimed at young people such as an arcade or skating rink should be a priority. Renovation of the theater just north of the Square could provide additional entertainment options and draw evening business for restaurants and retailers.

Fill Vacant Spaces with New Retailers and Restaurants

As indicated in the data analysis component of this report, there are opportunities for additional retailers Downtown. In order for Clinton to capture more retail spending and make Downtown a more vibrant place, additional retail business should be encouraged. While Downtown Clinton's current occupancy rate is higher than some traditional downtowns, several buildings have vacancies, and retail or restaurant uses should usually be the primary target for filling vacant spaces.

- *Initiate a retail/restaurant recruitment program*

  A proactive business recruitment campaign, driven by Clinton Main Street with participation of existing Downtown businesses, is a key element of the retail development strategy. A retail recruitment team should consider specific retail types of businesses (i.e., businesses looking to relocate or expand, new "start-up" enterprises, successful businesses interested in an additional site) and develop materials to direct their outreach efforts. Tools that should be used by the recruitment team include:

  - An expanded version of Clinton Main Street's "available building list" including an exterior photo, space dimensions, listed rental rates, contact information, and

building amenities. Listings should suggest the type of businesses for which the available space is best suited.

- Listing of target businesses to contact. The targets should be limited to retail, restaurants or unique services that would drive traffic and complement the existing business mix. A list of local bankers, real estate agents, and representatives from the nearest small business development center should also be developed to ensure they have up-to-date property listings and promotional information about Downtown.
- 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.
- Standard "business opportunity" placards with Main Street/City logo placards to display in vacant storefronts.
- Also consider filling vacant storefront windows with paintings, sculpture, or other works by local artists.

♦ *Target businesses that complement Downtown's Brand.*

In addition to filling gaps of unmet retail supply a recruitment campaign should also highlight businesses that will complement existing retailers. For instance several home furnishing retailers are located Downtown, and certain types of businesses would complement these establishments and help build regional perceptions of Clinton as a destination for furniture and home décor.

♦ *Use market analysis and survey results as basis for recruiting*

The data tables (Table 5, 6, 7-A, 7-B and 8; Appendix B) included in this report will be useful as businesses or entrepreneurs evaluate the market potential for their business. When working with prospective retailers, the retail recruitment team should cite data related to the applicable market or consumer segment, pointing out, for instance that consumers in the Secondary Trade Area spend $6.1 million at specialty food stores, and that currently only 63% of that spending is captured, creating a good business opportunity for a new player in the market.

♦ *Develop unique incentives tailored to retailers and restaurants.*

Incentives or assistance can be narrowly crafted to target retail or restaurants. Some communities have offered specific assistance programs for new restaurant startups (e.g., a grant program to offset significant costs related to code requirements for new foodservice facilities). Another example would be to offer a matching grant for appropriate signs or awnings for new retail businesses. The ongoing incentives

provided through Main Street (assistance with marketing, promotions, events, etc.) should also be emphasized as a competitive advantage of a Downtown location.

Enhance the Downtown Environment

Downtown Clinton's historic architectural character and physical layout is the key to its draw as a unique retail environment. Protecting and improving the quality of the built environment must be a major component of the retail development strategy, just as retail will be a major piece of Clinton's overall Downtown revitalization plan.

The public and private sectors must continue their partnership to preserve and enhance an environment in which retail can thrive. This will require various means of creative cooperation among elected and appointed municipal officials, City staff, and private business and property owners to maximize the impact of their individual efforts in Downtown Clinton. New public sector mechanisms such as a Community Improvement District or Tax Increment Finance district may be needed to leverage Community Development Block Grant or other funds for streetscape, open space and infrastructure improvements. Public sector activity should be aimed at inducing private investment in buildings and sites as part of a comprehensive physical revitalization program. The following items should be Clinton's priorities:

- *Continued façade restoration and renovation.*

  Several impressive façade restoration projects have been completed on Clinton's Downtown Square. The City and Clinton Main Street must work to encourage restoration of several key buildings on the Square. This may require making matching grants, offering low-interest loans or providing technical assistance (especially architectural design).

  Assistance with façade improvements should not be limited to the Square. A number of buildings in the blocks adjacent to the Square are in need of exterior renovation. Incentive programs should also recognize the need for work to the side and rear of buildings, some of which have attractive façades. One advantage of building renovation incentives is that they can be granted with conditions, providing an opportunity to ensure improvements are properly designed and constructed to create an appearance consistent with traditional downtown design principles.

- *Encourage redevelopment and new construction that adds retail space.*

  The new Elks/Kreisler building on the Square is proof that new buildings, if designed appropriately, can complement historic downtown architecture. Redevelopment opportunities, especially in the blocks south and east of the Square, may arise in coming years as vacant spaces are filled and demand for additional commercial space grows. As a matter of policy, retail or restaurant uses should be the priority for ground-floor uses in new buildings. Further, new buildings should generally respect the traditional scale and appearance of Downtown buildings. As a rule, demolition

of historic buildings within a traditional downtown should only be allowed if rehabilitation and adaptive reuse options are unfeasible. A limited degree of demolition and redevelopment is appropriate if it will result in construction of new, appropriately designed buildings.

- *Think beyond the Square.*

  Clinton is fortunate to have healthy occupancy rates and attractive, well maintained buildings on its Square. But Downtown Clinton is more than the Square, and there are a number of buildings and sites in the blocks surrounding the Square in need of reinvestment. Several properties should be targeted for redevelopment, including parcels in blocks south and east of the Square. Strategic planning (as part of the DREAM program and on an ongoing basis) to capitalize on these redevelopment opportunities will consider the best use for underutilized properties or other potential target sites for reinvestment. The 2nd Street and Ohio Street corridors will be a major part of the overall revitalization effort, as these streets connect Downtown to the Highway 7/13 Bypass, the City's regional arterial routes.

- *Support code enforcement and plan review efforts.*

  The City's code enforcement efforts should be continued and strengthened to ensure that Clinton's Downtown buildings and sites are properly maintained. Building code issues in the context of historic building rehabilitation can be difficult, as property owners can view code compliance as a costly impediment to renovation. Clinton Main Street can also assist the City with building or property maintenance issues by working with property owners before the City takes formal enforcement action. By requiring City review of building plans prior to any major remodeling or new construction in the Downtown area, the City can protect Downtown's historic character and appearance, an important community asset.

- Encourage parking lot and landscaping improvements.

  Several private parking lots Downtown, including several gravel parking and loading areas are in need of upgrades. All parking lots should be subject to a minimum paved surface requirement and landscaping requirements. Whether through zoning requirements or with an incentive program, property owners should be encouraged to pave gravel parking and loading and install attractive landscaping.

Gradually adjust business mix to increase proportion of retail

Office and service uses are an important part of the business mix in any downtown. However, having too much office space or other non-retail uses in ground-floor downtown buildings hinders foot traffic, restricts growth of sales tax revenue, and can make it difficult for retailers to draw evening or weekend customers.

Downtown Clinton's business mix is relatively healthy, with a combination of retailers, restaurants, government offices, business and consumer services and professional offices. Ideally, more ground-floor space on the Square and adjacent blocks should be dedicated to retailers rather than office uses. Special incentives could be designed to encourage building renovation projects that create retail-oriented tenant spaces. Similarly, incentives for creation of new office space should be evaluated in terms of the overall Downtown business mix and whether the property in question should be targeted for retail use instead.

Despite its considerable assets, Downtown Clinton will face major challenges in developing its retail market. Two primary challenges are competition from large national retailers in auto-oriented areas and the desire of some area consumers to make occasional shopping trips to the Kansas City or Springfield metro areas. Building a brand for Downtown Clinton as a shopping/dining destination and spreading awareness of that brand beyond the 30-minute drive time is key to advancing Downtown Clinton's retail development goals.

CONCLUSIONS

The retail market for Downtown Clinton has both opportunities and challenges. Perhaps Downtown's greatest opportunity lies in its existing image as a pleasant, historic setting with convenient parking. The critical mass of offices and institutions Downtown and Clinton's central location in the surrounding rural area brings a steady source of customers to town. Consumer spending data reveals that Downtown captures a significant share of the retail sales made in Clinton, yet the City and Downtown both lose sales for certain categories of sales to competing shopping areas outside the STA.

Capitalizing on the existing consumer base and growing the retail market will be challenging, yet is very possible. Downtown has the pedestrian environment of sidewalks, buildings with architectural character, and a variety of shops that makes for a "shopping experience". Such 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. Clinton should promote Downtown as an *experience* and a shopping and dining destination similar to the new retail developments mentioned above.

Occupancy rates for Downtown Clinton are quite good, especially for a town of Clinton's size in a rural market. However, there are a number of available spaces Downtown, and many are well suited to retail or restaurant use. The successful record of Clinton Main Street, various festivals and events, and the relative stability of Clinton's economy give promise to future growth of the retail sector in Downtown Clinton.

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APPENDIX

Appendix A-1
Downtown Clinton

DREAM Study Area
City of Clinton, Missouri

Legend

Downtown Clinton

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Appendix A-2
Primary Trade Area

Downtown Study Area
City of Clinton, Missouri

Legend

Primary Trade Area

D·R·E·A·M

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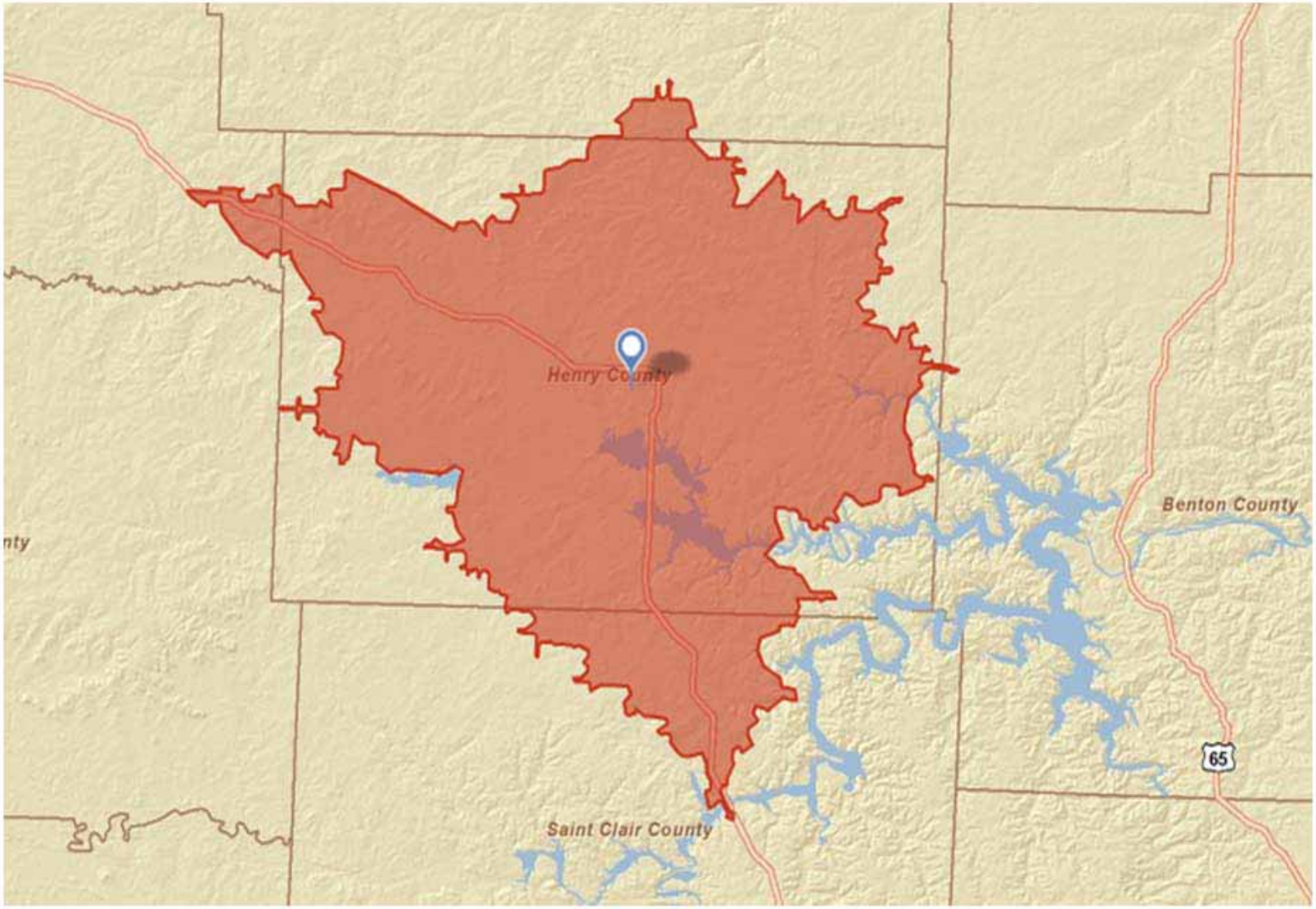
Appendix A-3
Secondary Trade Area

Downtown Study Area
City of Clinton, Missouri



Legend

Secondary Trade Area

MARCH 2010

PGAVURBANCONSULTING

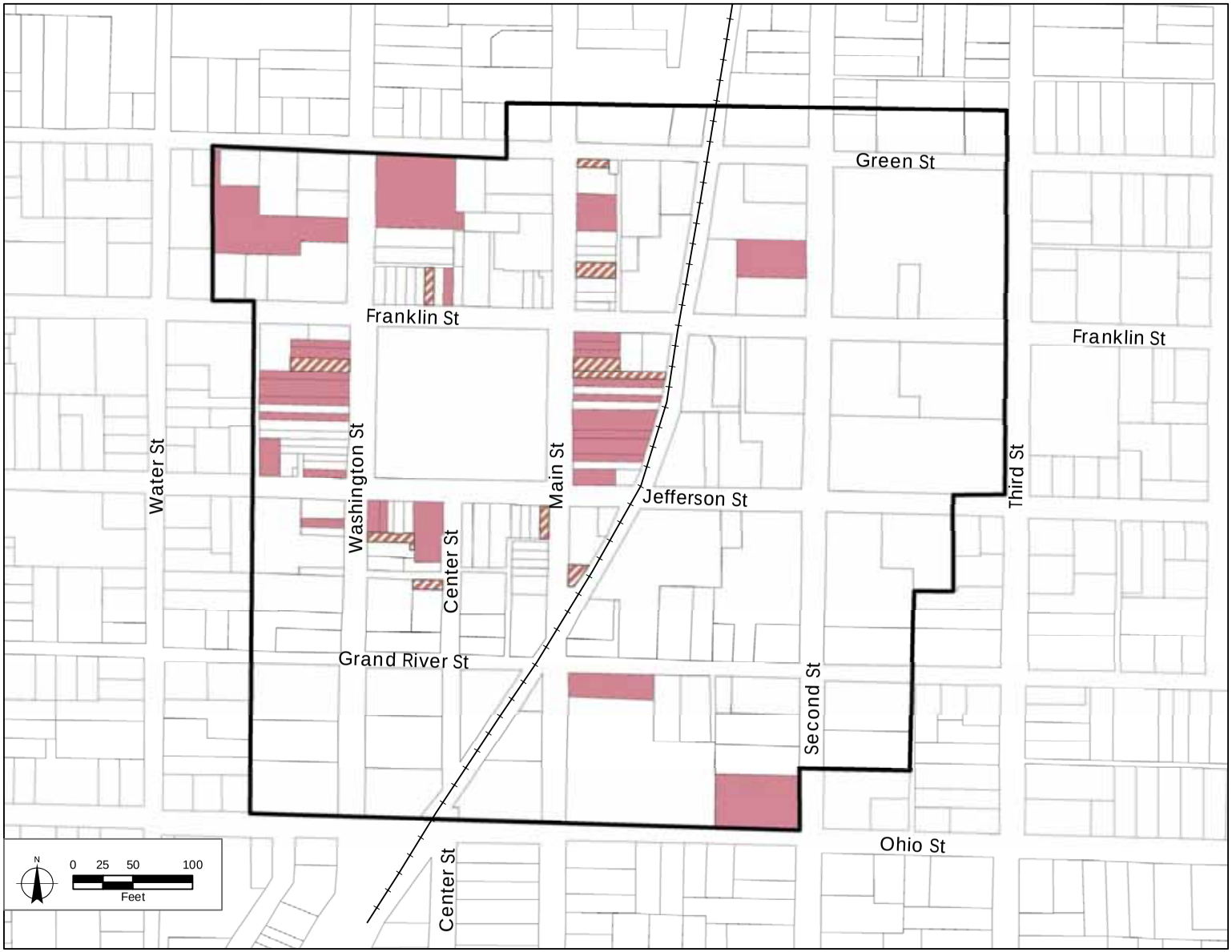
D·R·E·A·M

Appendix B
Retail Demand & Sales
Clinton, MO

Industry Group	Secondary Trade Area Demand	STA Businesses	STA Total Retail Sales	STA Gap	PrimaryTrade Area Retail Demand	Primary Trade Area Businesses	Total Retail Dollars Spent in the Primary Trade Area	Downtown Area Total Amount Spent	Downtown Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$94,832,078	228	$121,327,541	$ (26,495,463)	$58,021,103	173	$107,817,739	$14,769,371	47
Total Food & Drink (NAICS 722)	$20,481,372	54	$24,995,358	$ (4,513,986)	$20,481,372	43	$22,845,048	$1,876,256	8
Total Retail Trade (NAICS 44-45)	$74,350,706	174	$96,332,183	$ (21,981,477)	$37,539,731	130	$84,972,691	$12,893,115	39
Furniture & Home Furnishings Stores (NAICS 442)	$3,893,276	10	$6,792,634	$ (2,899,358)	$2,010,818	8	$5,635,203	$4,786,615	2
Furniture Stores (NAICS 4421)	$2,248,367	5	$2,523,328	$ (274,961)	$1,150,063	4	$1,967,200	$3,485,969	1
Home Furnishings Stores (NAICS 4422)	$1,644,909	5	$4,269,306	$ (2,624,397)	$860,755	4	$3,668,003	$209,793	1
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$3,709,297	10	$3,127,521	$ 581,776	$1,978,446	8	$2,881,656	$755,594	3
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$5,404,852	20	$6,226,443	$ (821,591)	$2,532,962	15	$4,418,780	$1,428,746	7
Building Material and Supplies Dealers (NAICS 4441)	$4,681,790	17	$5,567,450	$ (885,660)	$2,188,825	12	$3,789,048	$1,348,957	6
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$723,062	3	$658,993	$ 64,069	$344,137	3	$629,732	$79,789	1
Food & Beverage Stores (NAICS 445)	$18,116,606	11	$20,748,881	$ (2,632,275)	$9,095,372	5	$17,648,989	$0	0
Grocery Stores (NAICS 4451)	$13,669,241	8	$14,606,295	$ (937,054)	$6,611,761	4	$12,320,075	$0	0
Specialty Food Stores (NAICS 4452)	$3,889,872	3	$6,142,586	$ (2,252,714)	$2,171,179	1	$5,328,914	$0	0
Beer, Wine, and Liquor Stores (NAICS 4453)	$557,493	0	$0	$ 557,493	$312,432	0	$0	$0	0
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$5,819,640	10	$8,784,107	$ (2,964,467)	$3,088,756	10	$8,265,171	$754,664	2
Clothing and Clothing Accessories Stores (NAICS 448)	$3,272,010	12	$3,165,279	$ 106,731	$1,822,311	12	$3,102,944	$1,382,613	6
Clothing Stores (NAICS 4481)	$1,944,163	9	$2,576,432	$ (632,269)	$1,089,105	9	$2,514,104	$926,846	3
Shoe Stores (NAICS 4482)	$913,106	1	$278,884	$ 634,222	$511,921	1	$278,881	$215,856	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$414,741	2	$309,963	$ 104,778	$221,285	2	$309,959	$239,911	2
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$1,187,546	21	$1,638,018	$ (450,472)	$659,908	14	$1,275,294	$335,527	4
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$442,126	18	$1,197,433	$ (755,307)	$225,411	11	$834,712	$141,770	3
Book, Periodical, and Music Stores (NAICS 4512)	$745,420	3	$440,585	$ 304,835	$434,497	3	$440,582	$193,757	1
General Merchandise Stores (NAICS 452)	$30,863,954	9	$41,888,969	$ (11,025,015)	$15,374,293	8	$39,828,979	$4,984,299	3
Department Stores Excluding Leased Depts. (NAICS 4521)	$18,060,061	5	$26,823,153	$ (8,763,092)	$9,191,334	4	$25,014,454	$63,727	1
Other General Merchandise Stores (NAICS 4529)	$12,803,893	4	$15,065,816	$ (2,261,923)	$6,182,959	4	$14,814,525	$4,920,572	2
Miscellaneous Store Retailers (NAICS 453)	$2,083,525	26	$3,960,331	$ (1,876,806)	$976,865	18	$1,915,675	$618,224	6
Florists (NAICS 4531)	$210,531	2	$268,765	$ (58,234)	$78,290	2	$268,765	$33,595	0
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$502,339	9	$1,000,809	$ (498,470)	$229,633	8	$972,590	$293,491	3
Used Merchandise Stores (NAICS 4533)	$354,208	8	$308,732	$ 45,476	$183,224	5	$165,767	$55,342	2
Other Miscellaneous Store Retailers (NAICS 4539)	$1,016,447	7	$2,382,025	$ (1,365,578)	$485,718	3	$508,553	$235,796	1
Food Services & Drinking Places (NAICS 722)	$20,481,372	54	$24,995,358	$ (4,513,986)	$10,675,501	43	$22,845,048	$1,876,256	8
Full-Service Restaurants (NAICS 7221)	$14,216,485	29	$7,250,725	$ 6,965,760	$7,644,002	21	$6,265,045	$547,898	3
Limited-Service Eating Places (NAICS 7222)	$5,507,896	15	$14,576,953	$ (9,069,057)	$2,655,721	14	$13,927,689	$296,067	2
Special Food Services (NAICS 7223)	$480,428	3	$1,803,646	$ (1,323,218)	$241,750	3	$1,751,666	$752,466	1
Drinking Places - Alcoholic Beverages (NAICS 7224)	$276,563	7	$1,364,034	$ (1,087,471)	$134,028	5	$900,648	$279,825	2

Appendix C
Retail Locations

Downtown Study Area
City of Clinton, Missouri



Legend

- Retail
- Restaurant/Bar
- Study Area

MARCH 2010

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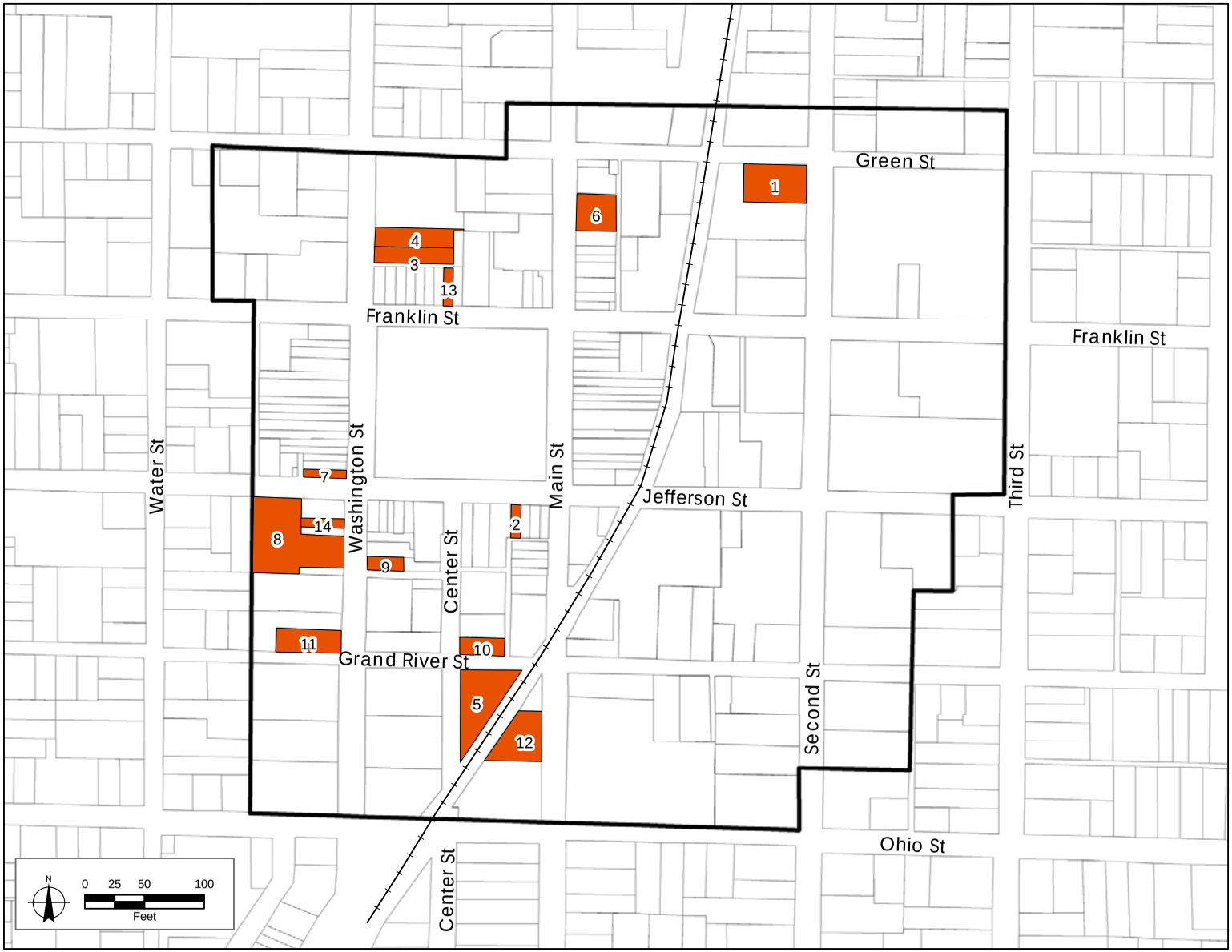
Appendix D
1st Floor Vacancy

Downtown Study Area
City of Clinton, Missouri



Legend

1st Floor Vacancy

Study Area

MARCH 2010

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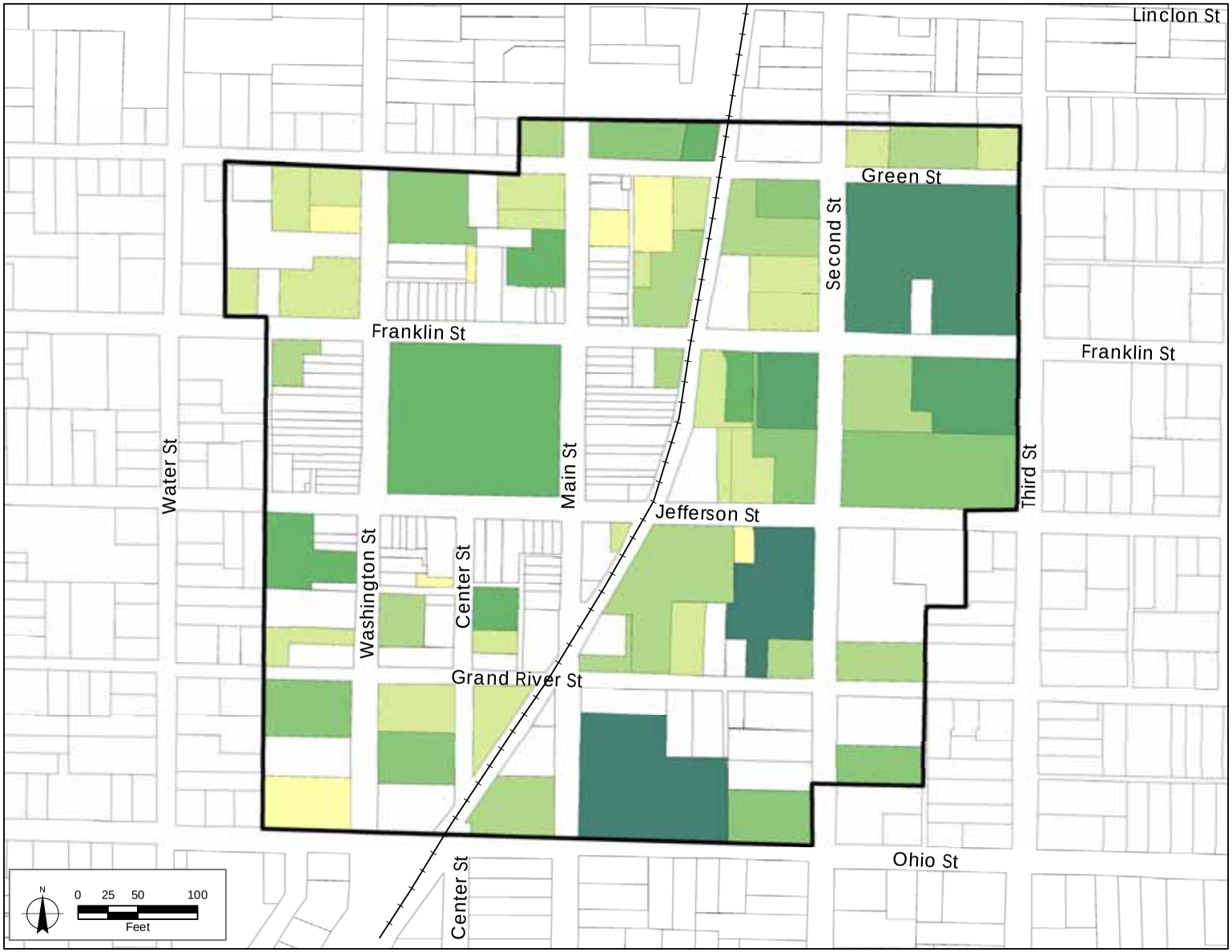

Appendix E
Parking Inventory
Number of Spaces

Downtown Study Area
City of Clinton, Missouri

Legend

- 1-5
- 6-10
- 11-20
- 21-30
- 31-40
- 41-50
- 71-80
- 81-90
- Study Area

MARCH 2010

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Appendix F

Existing Store Checklist

Exterior

Storefront:

- Check Overall Condition, are repairs needed?

☐ Yes

☐ No

☐ Renovation/Remodel Preferred

Description

_____

_____

_____

_____

- Is new paint needed?

☐ Yes

☐ No

- Does the paint match the store brand/logo?

☐ Yes

☐ No

Description

_____

_____

_____

_____

- Is the storefront generally clean?

☐ Yes

☐ No

Description

_____

_____

_____

_____

- Are planters or window boxes placed to frame the entry?

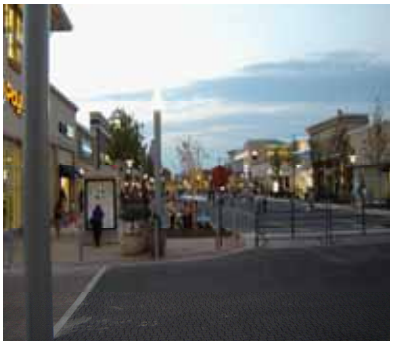
☐ Yes

☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Storefront:



- Are there hazards in front of the storefront?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Is the sidewalk clean and level?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Exterior Signage:

- Does signage occur at eye level (Pedestrian)?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Does signage occur at car level (Driver)?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

D·R·E·A·M
INITIATIVE

Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

☐ Yes
☐ No
Description

_____
_____
_____
_____

- Is signage maintained in good condition?

☐ Yes
☐ No
Description

_____
_____
_____
_____

- Does the signage complement the building and area?

☐ Yes
☐ No
Description

_____
_____
_____
_____

- Are the exterior signs lighted (at night)?

☐ Yes
☐ No
Description

_____
_____
_____
_____

D·R·E·A·M
INITIATIVE

Existing Store Checklist

Display Windows:

- What is the condition of props and goods? Are they faded?

  Description

  _____

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- Are window displays rotated every 4-6 weeks?
  - ☐ Yes
  - ☐ No

- Do the displays effectively represent the store brand?
  - ☐ Yes
  - ☐ No

- Are displays including the best/most poplar products?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- If it's a corner shop window, do the window displays encourage the pedestrian to cross the street to your block?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Are the window displays lit at night?
  - ☐ Yes
  - ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Interior

Flooring:

- Is the floor worn/hazardous/slippery?
  - ☐ Yes
  - ☐ No
- Is the floor clean?
  - ☐ Yes
  - ☐ No
- Is there a 5-10' area without store fixtures at the entry?
  - ☐ Yes
  - ☐ No
- Is there a walk off area to clean shoes?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Ceiling:

- Is the finish in good condition (stained/missing tiles/peeling paint)?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Is the HVAC duct work clean?
  - ☐ Yes
  - ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Ceiling:

- Are there any other distracting issues?

Description

_____

_____

_____

_____

Lighting:

- Is the lighting adequate to show the merchandise?
  - ☐ Yes
  - ☐ No
- Is the bulb type appropriate (fluorescent or incandescent)?
  - ☐ Yes
  - ☐ No
- Are the bulbs the same type?
  - ☐ Yes
  - ☐ No
- Does the lighting design match the rest of the interior style?
  - ☐ Yes
  - ☐ No

Description

_____

_____

_____

_____

- Are there adjustable lights to create focal points?
  - ☐ Yes
  - ☐ No

Description

_____

_____

_____

_____

D·R·E·A·M INITIATIVE

Existing Store Checklist

Interior Colors:

- Are the interior finishes (painting, wall coverings, paneling, etc.) in good condition?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Are the paint and finish colors consistent with the brand/ logo?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Are the paint colors consistent from fixture to fixture?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Circulation:

- Does the foot traffic flow smoothly?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

D·R·E·A·M INITIATIVE

Existing Store Checklist

Circulation:

- Is the intended path clear to customers?
  - ☐ Yes
  - ☐ No
- Are off-limit areas clear to the customer?
  - ☐ Yes
  - ☐ No
- Are there slow pockets of merchandise that receive little attention?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Cash Wrap/Register:

- Is the cash wrap area in good condition?
  - ☐ Yes
  - ☐ No
- If there's a showcase, is the lighting adequate?
  - ☐ Yes
  - ☐ No
- Is it easy for customers to locate where to cash out?
  - ☐ Yes
  - ☐ No
- Is the floor area clear to assure ease in purchasing?
  - ☐ Yes
  - ☐ No
- Is the counter top clutter-free?
  - ☐ Yes
  - ☐ No
- Is the location appropriate (it should not occupy prime real estate)?
  - ☐ Yes
  - ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Cash Wrap/Register:

- Are the views of the shop and exits open enough for security?
  - ☐ Yes
  - ☐ No
- Is there fixture nearby for impulse purchases?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Fixtures & Equipment:

- Does the fixture style match the brand or logo?
  - ☐ Yes
  - ☐ No
- Is there a range of heights and sizes to keep the eye moving?
  - ☐ Yes
  - ☐ No
- Is the un-shoppable high area (72") used for display?
  - ☐ Yes
  - ☐ No
- Is the un-shoppable low area (18") un-stocked and/or used for storage?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Merchandising:

- Are the products restocked or re-arranged consistently to make the store feel full?
  - ☐ Yes
  - ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Merchandising:

- Are the displays group by color, material or product brand?
  - ☐ Yes
  - ☐ No
- Does the product inventory match the internet site?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Is there a feature fixture near the entry that tells the story of the store's overall brand and product style?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Cleanliness:

- Is the store clean?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Are boxes cleared and out of sight?
  - ☐ Yes
  - ☐ No
- Are the views into off limits areas blocked?
  - ☐ Yes
  - ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Cleanliness:

- Are the signs and product pricing professional, consistent in type and not hand made?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Comfort:

- Is the shop a comfortable temperature?
  - ☐ Yes
  - ☐ No
- Are the entry doors easy to open and close?
  - ☐ Yes
  - ☐ No
- Are the displays and fixtures stable?
  - ☐ Yes
  - ☐ No
- Is music incorporated to make the store feel occupied?
  - ☐ Yes
  - ☐ No
- Does the music reflect the store brand?
  - ☐ Yes
  - ☐ No

Dressing Rooms:

- Is there a bench, wall hook and mirror?
  - ☐ Yes
  - ☐ No
- Are the doors secure and is privacy addressed?
  - ☐ Yes
  - ☐ No
- Are non-selected items returned to stock quickly?
  - ☐ Yes
  - ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Dressing Rooms:

- Are the rooms placed to discourage shoplifting?
  - ☐ Yes
  - ☐ No

Staff:

- Is the staff helpful and cheerful?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Is the staff educated about the merchandise?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

- Does the staff suggest other downtown shops to the customers?
  - ☐ Yes
  - ☐ No

  Description

  _____

  _____

  _____

  _____

Other Comments.

_____

_____

_____

_____

D·R·E·A·M INITIATIVE

APPENDIX G

Table References

TABLE 1: DOWNTOWN TRADE AREA DEMOGRAPHIC TRENDS
MISSOURI ECONOMIC RESEARCH & INFORMATION CENTER

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MISSOURI ECONOMIC RESEARCH & INFORMATION CENTER

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TABLE 4: RETAIL ESTABLISHMENTS
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TABLE 5: EXISTING RETAIL SUPPLY
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TABLE 6: AVERAGE ANNUAL CONSUMER EXPENDITURES PER HOUSEHOLD
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TABLE 7: HOUSEHOLD & DISPOSABLE INCOME
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TABLE 8: DEMAND & SALES
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ESRI & PGAV

TABLE 10: VACANCIES
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PGAV

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Table 3: Consumer Expenditures — 2008 Consumer Expenditures for Downtown, Citywide, County, Metro Area & Secondary Trade Area

Table 4: Retail —Retail Competitive Market Overview

Table 5: Retail MPI — Retail Market Potential for Downtown, Citywide, County, Metro Area & Secondary Trade Area

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Table 17: SF3 Comparison County —1990-2000 Comparison Profile

Table 18: SF3 Comparison Metro —1990-2000 Comparison Profile

Table 19: SF3 Comparison STA —1990-2000 Comparison Profile

Table 20: MPI Downtown — Retail Market Potential

Table 21: MPI City — Retail Market Potential

Table 22: MPI County — Retail Market Potential

Table 23: MPI Metro — Retail Market Potential

Table 24: MPI STA — Retail Market Potential

Table 25: Retail Exp Downtown — Retail Goods & Services Expenditures

Table 26: Retail Exp City — Retail Goods & Services Expenditures

Table 27: Retail Exp County — Retail Goods & Services Expenditures

Table 28: Retail Exp Metro — Retail Goods & Services Expenditures

Table 29: Retail Exp STA — Retail Goods & Services Expenditures

Table 30: Market Profile Downtown — Market Profile

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Table 33: SF3 Downtown — Census 2000 Summary Profile

Table 34: SF3 City — Census 2000 Summary Profile

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Table 36: SF3 Metro — Census 2000 Summary Profile

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