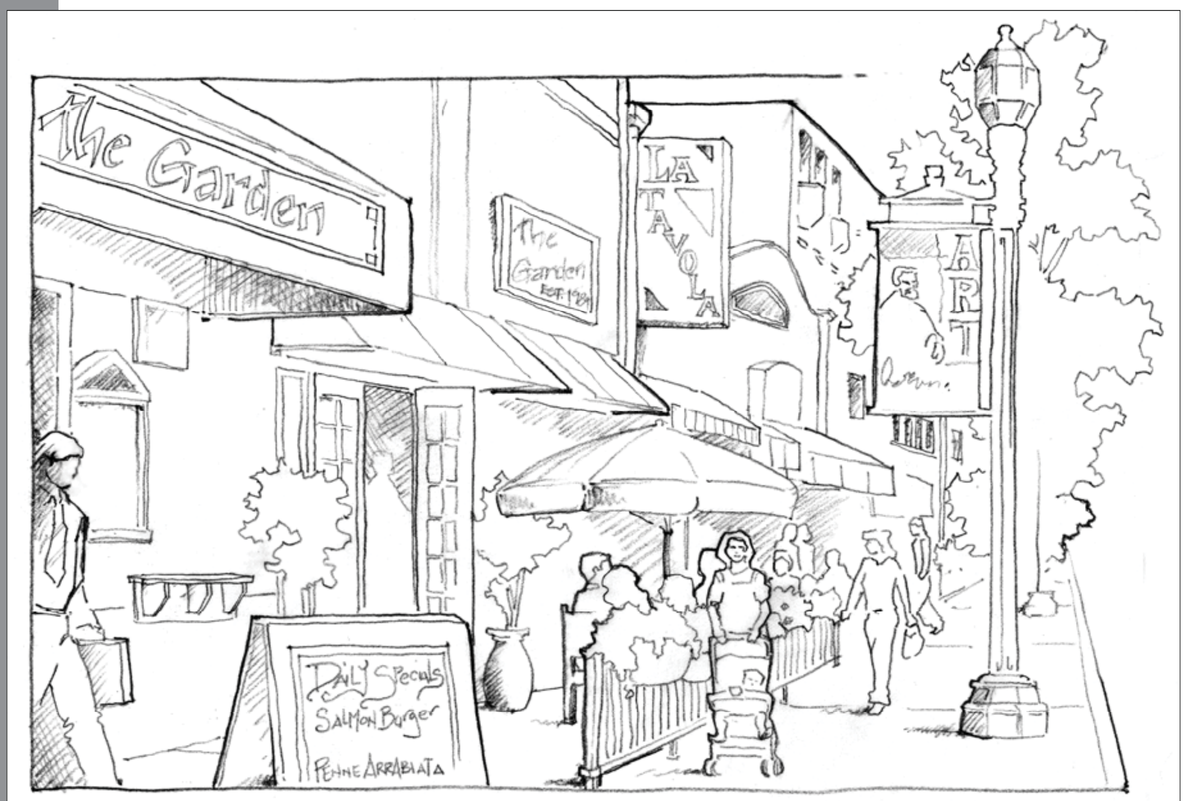
Maryville, Missouri

DOWNTOWN
REVITALIZATION &
ECONOMIC
ASSISTANCE FOR
MISSOURI

RETAIL MARKET ANALYSIS



DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
D·R·E·A·M
INITIATIVE

DECEMBER 2010

PGAVPLANNERS

ACKNOWLEDGMENTS

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EXECUTIVE SUMMARY

The retail market in Downtown Maryville is active, in part, due to the annual influx of Northwestern Missouri State University students. The student market can have a buoyant effect on the Downtown economy overall, but can also restrict the types of businesses that develop and discourage other shoppers. Downtown Maryville can strike a balance between the overall retail market and the student market, and seize opportunities for real and sustainable growth.

The Retail Market Analysis determined that, with the proper additions to the consumer goods and hospitality choices, the Downtown retail market could see an increase in sales. These projections are based on existing sales volumes, existing vacant floor space, and estimated leakage of retail dollars being spent outside of Downtown. As of the publication of this report, the local, state and national economy is recovering from a recession and retail markets tend to be overbuilt in certain aspects. However, Downtown Maryville has many assets to grow and sustain the local retail market including an existing student population, good highway access, and several established restaurants. Additionally, the City has made recent improvements in public infrastructure and Nodaway County has constructed the Nodaway County Administration Building and renovated the courthouse. These assets demonstrate significant support for Downtown, and along with the opportunities identified by the Retail Market Analysis, illustrate the potential for an enhanced retail market and more vibrant Downtown.

The Retail Market Analysis was conducted by analyzing data for three geographic areas: The Downtown Trade Area (DTA) which is the DREAM study area; The Primary Trade Area (PTA); and the Secondary Trade Area (STA). City leaders defined the PTA as roughly a 30-minute drive time around Downtown Maryville ending at Andrew County to the South. The STA is City-defined representing the area from which shoppers are drawn for Downtown stores. The existing retail market, demographics, and surveys were also documented and analyzed to help determine strategies to strengthen the Downtown Maryville retail market.

The DTA consists of 86 acres with 401,602 square feet of first-floor commercial and retail space. PGAV PLANNERS observed an estimated 98,325 square feet of first-floor space occupied as retail/restaurant use and an additional 48,526 square feet of vacant space. The existing occupied retail space (63,051 square feet) is generating about $9 million in annual sales (not including automobiles, gasoline stations, or non-store retailers) or about $182 per square foot. The existing occupied restaurant space (35,274 square feet) is generating $4.6 million in sales or $131 per square foot.

Depending on the mix of attracted businesses, the 48,526 square feet of vacant space represents an additional $6 to $9 million in potential annual retail and restaurant sales.

The Retail Market Analysis concluded that there is unmet demand (the difference between retail demand and actual sales) in the STA and that Downtown Maryville could support about 273,000 square feet of additional retail business. Existing retailers could capture this unmet demand by expanding floor area and offering new products or Downtown Maryville could attract new retail businesses. Given that the demand for additional retail is over 5 times that of available vacant space, the City should encourage the conversion of non-retail commercial space for retail or restaurant uses.

Table 17 from the report, repeated below, shows Future Retail Growth areas for Downtown Maryville. The goods and services are classified according to the North American Industry Classification System (NAICS).

TABLE 17: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[2]
Full-Service Restaurants (NAICS 7221)	$11,603,194	88,574
Building Material and Supplies Dealers (NAICS 4441)	$5,911,331	32,480
Special Food Services (NAICS 7223)	$4,695,868	35,846
Furniture Stores (NAICS 4421)	$4,053,668	22,273
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$3,913,526	21,503
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$2,771,328	15,227
Clothing Stores (NAICS 4481)	$2,664,070	14,638
Limited-Service Eating Places (NAICS 7222)	$1,589,464	12,133
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$1,282,576	7,047
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$707,987	3,890
Home Furnishings Stores (NAICS 4422)	$592,381	3,255
Shoe Stores (NAICS 4482)	$581,365	3,194
Other Miscellaneous Store Retailers (NAICS 4539)	$575,966	3,165
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$552,212	3,034
Used Merchandise Stores (NAICS 4533)	$500,359	2,749
Beer, Wine, and Liquor Stores (NAICS 4453)	$424,274	2,331
Florists (NAICS 4531)	$237,439	1,305
TOTAL	$ 42,657,008	272,644

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

[2] Based on $182 in retail sales per square foot, $131 in restaurant sales per square foot, and existing retail building inventory and activity in Downtown Maryville.

Although unmet demand for a grocery is not considered as a primary retail business to attract, a small location that could serve the Northwestern Missouri State University campus could be successful selling more specialty foods. If such a store can include a bakery and breakfast café and host a Farmer's Market on its parking lot, numerous needs and demands are being met with one business in Downtown.

The areas of highest unmet retail demand upon which Downtown Maryville could capitalize include:

	Sales Opportunity	Potential S.F.
• Restaurants (Full-service/limited service/special):	$17.9 million	136,600 s.f.
• Building Material & Supply Stores:	$5.9 million	32,500 s.f.
• Furniture / Home Furnishing Stores:	$4.7 million	25,500 s.f.
• Clothing, Jewelry, & Shoes:	$3.9 million	21,700 s.f.
• Health & Personal Care Stores:	$3.9 million	21,500 s.f.
• Electronics & Appliance Stores:	$2.8 million	15,227 s.f.
• Office Supplies, Stationary, and Gift Stores:	$1.3 million	7,000 s.f.

Key recommendations from this report that would assist Downtown businesses in satisfying this retail demand include:

- Full Service Restaurants: New restaurants or expanded existing restaurants could fill much of the vacant floor space on the courthouse square. Greater options for casual dining will meet the requests documented in the community surveys conducted early in the DREAM Initiative. Consumers travel for variety and Maryville competes with the variety found in St. Joseph and Kansas City, Missouri. Improvements to the selection of Downtown restaurants will enhance its ability to attract new customers and serve the needs of residents.

  Specifically, residents and visitors indicated that an all-hours, breakfast-type restaurant is desired. This would be a great addition to the Downtown business mix and has the potential to develop a loyal student, Downtown employee, and resident customer base, while being an attractive place for visitors to stop. Ideally, such a restaurant would be located on the courthouse square or near lodging.

- Building Material and Supply Stores: The unmet demand shown in building material and supply stores of nearly $6 million is significant. However, stores in this category tend to use larger spaces due to the size of the building supplies. Downtown is also home to an existing building supply company, Maryville Lumber, that may be able to adjust its product line to better meet this demand.

- Furniture stores were combined with home furnishings to suggest a store selling similar products could develop a more effective retail draw than a stand-alone furniture or home furnishings store. A high quality furniture store has potential to be an anchor in Downtown and will also appeal to residents and visitors. This type of store could also be advantageous for the university population as the students move in and out each year. However, it is important that the store does not become a used furniture store or consignment shop only frequented by the students. High quality merchandise can also satisfy the boutique and specialty aspects that shoppers desire, particularly when combined with home furnishings as previously suggested.

- Clothing stores demonstrate a large amount of unmet demand and are combined with jewelry, luggage, leather goods, and shoes. This type of store can be located within existing vacant buildings, and should include boutique-style shops that offer a variety of clothing products as well as accessories.

- Unmet demand for products in health & personal care can improve the retail mix with businesses that will appeal to residents as well as visitors. Stores in this sector include pharmacies, but also stores that carry products such as cosmetic and beauty supplies, perfumes, optical goods, and nutritional supplements.

- Electronics and appliance stores usually include a showroom, which tends to increase the size of the building space required, and appeal to both residents and visitors. A large store of this type can be a very successful anchor. Sales per square foot will vary according to the types of electronics and appliances sold.

- Office supply, stationary, and gift stores also demonstrate unmet retail demand. These types of stores are not generally found in small footprints, however a gift store in Downtown provides an important outlet for general items that may be of interest to tourists and other visitors. Existing retailers should be encouraged to expand their floor area to satisfy the unmet demand for products in this category.

- Existing Downtown businesses have the potential to expand product lines to satisfy a few other categories of unmet demand. Table 17 also shows a smaller amount of unmet demand in the areas of miscellaneous store retailers, sporting goods/hobby/ musical instruments, used merchandise, beer, wine & liquor, and florists.

- Additionally, bookstores, art supplies stores, and art galleries, while not demonstrating unmet demand, were indicated as businesses desired for Downtown Maryville in the community surveys. These businesses would generate positive pedestrian activity and serve NWMSU student needs.

- Bars and taverns demonstrated an oversupply of demand in Downtown Maryville. The City should discourage new businesses of this type. Existing bars and taverns should consider adjusting their business model to include more food items to meet some of the unmet casual dining demand.

INTRODUCTION

A significant component of a successful and vital downtown is a vibrant shopping area. In many instances, modern development trends have diminished the function of the typical American downtown. As neighborhood development sought affordable undeveloped land, cities expanded away from their downtown core. Shopping habits shifted as automobiles increased consumer mobility and shopping centers with major retailers located along major roadways. Smaller businesses have struggled to maintain their traditional downtown locations as residents, visitors, and fellow businesses have followed large retail development to the city's outskirts.

One way to achieve overall downtown revitalization is to encourage the restoration of downtown's function as a destination shopping hub of the region. An emphasis on unique retail stores and developing a positive pedestrian and shopping experience allows downtown to compete with higher volume sales areas in the community. The DREAM Initiative provides the important retail analysis and initial strategies to create a successful downtown retail environment. Although the primary focus of DREAM is downtown retail, some recommendations may include other uses and may integrate with and complement other DREAM tasks, such as the *Residential Demand Analysis*.

Downtown Maryville, the subject area of this report, is fortunate to have maintained much of its viability as a destination for shoppers. As noted, the presence of the student market from Northwest Missouri State University can be a positive influence, but can also lead to negative consequences. The history of the City and region is integral to Downtown and its character. These factors, combined with the business and governmental activity of the county seat, provide Downtown Maryville many assets upon which to draw. Additionally, Downtown has seen some public and private investment with improvements to the Courthouse Square, new county administration building, and infill developments.

METHODOLOGY

The Retail Market Analysis takes a comprehensive approach to quantify the retail demand and supply for the trade areas. The Analysis then identifies types of retail services that could likely be supported by existing unmet demand and provides recommendations on appropriate strategies for encouraging Downtown retail development. The report uses concepts common in other DREAM Initiative analyses and consists generally of four parts:

1) a review of the trade area demographics and trends;
2) an analysis of the trade area business mix and site characteristics;
3) identification of potential retail sectors to target; and
4) recommendations of retail development strategies and implementation techniques to achieve downtown retail market goals.

As a component of other DREAM Initiative activities, surveys have been conducted of business owners, City staff and officials, residents, and visitors which provide key insights into desired Downtown improvements and businesses. Additionally, the Missouri Housing Development Commission conducted an analysis of future residential demand for the City of Maryville in the DREAM *Residential Demand Analysis*. A physical examination of the trade area and surrounding region provides insight into traffic and pedestrian patterns and Downtown's business mix.

To determine unmet retail demand, the retail demand (or spending power) of the trade area, is compared to the available retail supply (or retail sales) of the trade area. Unmet demand is identified in retail categories where demand exceeds supply, and these categories are evaluated against information obtained through community survey results. The real estate and inventory data of the trade area is then used to develop recommendations regarding the attraction of specific types of retail, as well as potential Downtown store locations.

LIMITS OF STUDY

The Retail Market Analysis is intended to provide a general forecast of the amount and types of retail development that could be supported in the trade area. The assumptions and projections used in the retail analysis are valid and likely supported through the year 2014. The analysis is meant to provide a general strategic direction for developing retail in Downtown Maryville, but is not intended to be the sole basis for development or business decisions.

TRADE AREA PROFILE

TRADE AREA DEFINITIONS

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. For example, the trade area for a convenience store might be quite small, whereas 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 each type of business. The concept of the trade area is an important part of evaluating the performance of a retail district and determining the potential to expand retail activity.

The DREAM Retail Market Analysis evaluates the Downtown Trade Area (DTA or "Downtown Maryville"), the Primary Trade Area (PTA), and the Secondary Trade Area (STA). The DTA is identified as the DREAM Study Area. The PTA was determined by the City and can be described roughly as a 30-minute drive time around Downtown, but not extending into Andrew County to the South to reflect the tendency of residents in that area to be drawn instead to the St. Joseph and Kansas City, Missouri retail markets. The STA, also defined by the City, represents an area from which customers are consistently drawn for Downtown retail businesses. A map of each area is included in Appendix A and the three areas of analysis are summarized below.

- <u>Downtown Maryville (DTA)</u>: The focus of this report and the overall DREAM Initiative. The retail analysis determines the level of retail activity captured by Downtown Maryville and the amount of additional retail activity that could be captured with effective strategy implementation. Downtown Maryville is defined as the DREAM Study Area Boundary.

- <u>Primary Trade Area (PTA)</u>: A 30-minute drive time around Downtown that stops at the Andrew County line.

- <u>Secondary Trade Area (STA)</u>: A City provided polygon that includes communities from which Downtown Maryville draws customers on a consistent basis. Downtown should be attracting an estimated ninety to ninety-five percent (90%-95%) of all retail dollars from this area.

It is important to note that the retail draw of a trade area ignores municipal, county, and state boundaries. Typically, modern consumers will shop at the most convenient location, regardless of jurisdiction.

TRADE AREA DEMOGRAPHIC SNAPSHOT

To understand the potential for retail development in Downtown Maryville, key information about the population and households of the trade areas was obtained through various sources, including the State of Missouri. The demographic composition of each trade area is reviewed and will establish baseline date for future growth comparison.

The State of Missouri's demographic composition is provided to establish a performance indicator. With this information, future comparison can help determine if a trade area is leading or lagging in growth, in relation to the State as a whole.

The following table highlights the demographics from 2010 for Downtown, the PTA, STA, and the State of Missouri.

TABLE 1: 2010 DEMOGRAHIC SNAPSHOT

	Downtown Maryville	Primary Trade Area	Secondary Trade Area	State of Missouri
Population	469	17,692	43,704	5,984,833
Average Household Income	$31,467	$42,370	$39,696	$62,922
Households	318	7,468	19,881	2,703,311
Owner Occupied	98	3,973	11,534	1,665,239
Renter Occupied	176	2,703	5,386	702,860
Vacant Units	44	792	2,961	332,507
Median Age	27.1	30.4	37.2	37.7
19 and Under	84	4,475	10,884	1,606,622
20-44	228	7,072	14,710	1,967,041
45 and Over	158	6,145	18,110	2,411,170

MARKET PROFILE / DEMOGRAPHIC TRENDS

Each Trade Area is reviewed in the context of how its demographics have changed over recent time periods to estimate trend activity.

DOWNTOWN TRADE AREA (DTA)

The DTA for Maryville (Figure 1; the DREAM Study Boundary) is situated roughly in the center of the City and consists of about 222 buildings on 29 blocks.

As of 2010, the population of the DTA was 469 people, living in 318 households, for an average of 1.5 people per household. The average household income was $31,467, and the median age of residents was 27.1 years. Approximately 18% of the population were age 19 or younger; 48% between 20 and 44; and 34% were age 45 or older.

Table 2 illustrates current demographics and future demographic trends for the DTA.

Figure 1: Downtown Maryville

TABLE 2: DOWNTOWN MARYVILLE

	2000	2010	2015	% Change '00-'10	% Change '10-'15
Population	474	469	467	-1.1%	-0.4%
Average Household Income	$23,263	$31,467	$36,115	35.3%	14.8%
Households	299	318	323	6.4%	1.6%
Owner Occupied	101	98	97	-3.0%	-1.0%
Renter Occupied	169	176	178	4.1%	1.1%
Vacant Units	29	44	48	51.7%	9.1%
Median Age	27.0	27.1	27.9	0.4%	3.0%
19 and Under	90	84	81	-6.7%	-3.6%
20-44	239	228	225	-4.6%	-1.3%
45 and Over	146	158	165	8.2%	4.4%

Primary Trade Area (PTA)

The PTA was determined by the City and can be described roughly as a 30-minute drive time around Downtown Maryville (Shown in Figure 2). The PTA does not extend into Andrew County to the south to reflect the tendency of residents in that area to be drawn instead to the St. Joseph and Kansas City, Missouri retail markets.

As of 2010, the population of the PTA was 17,692 people, living in 7,468 households, for an average of 2.4 people per household. The average household income was $42,370, and the median age of residents was 30.4 years. About 25% of the population were 19 or younger; 40% between 20 and 44; and 35% were age 45 or older.

Figure 2: Primary Trade Area

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

TABLE 3: PRIMARY TRADE AREA

	2000	2010	2015	% Change '00-'10	% Change '10-'15
Population	17,412	17,692	17,811	1.6%	0.7%
Average Household Income	$32,168	$42,370	$48,353	31.7%	14.1%
Households	6,940	7,468	7,655	7.6%	2.5%
Owner Occupied	3,858	3,973	4,039	3.0%	1.7%
Renter Occupied	2,552	2,703	2,726	5.9%	0.9%
Vacant Units	530	792	890	49.4%	12.4%
Median Age	28.0	30.4	31.6	8.6%	3.9%
19 and Under	4,706	4,475	4,463	-4.9%	-0.3%
20-44	7,377	7,072	7,027	-4.1%	-0.6%
45 and Over	5,329	6,145	6,321	15.3%	2.9%

Secondary Trade Area (STA)

The PTA was determined by the City (Shown in Figure 3) and represents an area from which shoppers are consistently drawn for Downtown stores.

As of 2010, the population of the STA was 43,704 people, living in 19,881 households, for an average of 2.2 people per household. The average household income was $39,696, and the median age of residents was 37.2 years. About 25% of the population were age 19 or younger; 34% between 20 and 44; and 41% were age 45 or older.

Figure 3: Secondary Trade Area

Table 4 illustrates current demographics and future demographic trends for the STA.

TABLE 4: SECONDARY TRADE AREA

	2000	2010	2015	% Change '00-'10	% Change '10-'15
Population	45,043	43,704	42,909	-3.0%	-1.8%
Average Household Income	$31,831	$39,696	$45,576	24.7%	14.8%
Households	19,308	19,881	20,047	3.0%	0.8%
Owner Occupied	11,937	11,534	11,335	-3.4%	-1.7%
Renter Occupied	5,355	5,386	5,312	0.6%	-1.4%
Vacant Units	2,016	2,961	3,400	46.9%	14.8%
Median Age	36.0	37.2	37.8	3.3%	1.6%
19 and Under	12,247	10,884	10,552	-11.1%	-3.1%
20-44	15,882	14,710	14,390	-7.4%	-2.2%
45 and Over	16,914	18,110	17,967	7.1%	-0.8%

State of Missouri

As of 2010, the population of Missouri was just over 6 million people, living in about 2.7 million households, for an average of 2.2 people per household. The average household income was $49,074, and the median age of residents was 37.9 years. About 27% of the population were age 19 or younger; 32% between 20 and 44; and 41% were age 45 or older.

Table 5 illustrates current demographics and future trends for the State of Missouri.

TABLE 5: STATE OF MISSOURI

	2000	2010	2015	% Change '00-'10	% Change '10-'15
Population	5,595,211	6,003,689	6,179,056	7.3%	2.9%
Average Household Income	$38,005	$49,074	$55,430	29.1%	13.0%
Households	2,442,017	2,728,953	2,848,099	11.7%	4.4%
Owner Occupied	1,542,149	1,658,629	1,714,515	7.6%	3.4%
Renter Occupied	652,445	717,860	738,233	10.0%	2.8%
Vacant Units	247,423	352,464	395,351	42.5%	12.2%
Median Age	36.1	37.9	38.2	5.0%	0.8%
19 and Under	1,594,172	1,602,547	1,628,469	0.5%	1.6%
20-44	1,995,800	1,954,623	1,988,172	-2.1%	1.7%
45 and Over	2,005,239	2,446,519	2,562,415	22.0%	4.7%

Demographic Comparison

Tables 6, 7, and 8 illustrate the rates of change of base demographic information for the trade areas and the State of Missouri. This comparison shows little growth is expected in population and the growth in the number of households is below that of the State average. The average household income is predicted to increase slightly more than the State average and the median population age is expected to increase more than the State average.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Average HHI % Change		Median Age (in years)	
	00-'10	10-'15	00-'10	10-'15	00-'10	10-'15
Downtown	-1.1%	-0.4%	35.3%	14.8%	0.1	0.8
PTA	1.6%	0.7%	31.7%	14.1%	2.4	1.2
STA	-3.0%	-1.8%	24.7%	14.8%	1.2	0.6
State	7.3%	2.9%	29.1%	13.0%	1.8	0.3

TABLE 7: DEMOGRAPHIC AGE COMPARISON

	19 & Under Change		20-44 Change		45 & Over Change	
	00-'10	10-'15	00-'10	10-'15	00-'10	10-'15
Downtown	-6	-3	-11	-3	12	7
PTA	-231	-12	-305	-45	816	176
STA	-1363	-332	-1172	-320	1196	-143
State	8,375	25,922	-41,177	33,549	441,280	115,896

TABLE 8: DEMOGRAPHIC HOUSING UNITS COMPARISON

	Households Change		Owner Occupied Change		Renter Occupied Change	
	00-'10	10-'15	00-'10	10-'15	00-'10	10-'15
Downtown	19	5	-3	-1	7	2
PTA	528	187	115	66	151	23
STA	573	166	-403	-199	31	-74
State	286,936	119,146	116,480	55,886	65,415	20,373

The Trade Areas' stagnant population and household growth rates, although lagging the State of Missouri, are not a great cause for concern as the national housing market continues to recover. For Downtown Maryville, it is expected that the number of rental units will increase, while the number of owner occupied units will decrease.

The median age of residents is projected to increase more than the State Average in each of the trade areas. The DTA is the youngest of the trade areas, indicating the large student presence. Downtown is growing more residents in the category of "45 & over" than the other trade areas. These factors indicate that the Downtown housing market may be shifting from students to older residents. The City should be aware of the needs of an aging population. Effective solutions will likely include planning and zoning efforts, pedestrian-oriented public improvements, and innovative building regulations.

Although the average household income is projected to increase more than the State average, improvements in the quality of local businesses and the indigenous labor pool will enhance income even more.

HOUSING MARKET ANALYSIS SUMMARY

Residents are an important component of a vibrant downtown and add to the customer base by supporting nearby retail and service businesses. They give downtown a twenty-four hour people presence providing life on the sidewalks and streets, as well as keeping a watchful eye on downtown when businesses are closed.

The Missouri Housing Development Commission (MHDC) conducted a Residential Demand Analysis in the Fall of 2008 for the City of Maryville that projected residential demand for the area, with a focus on Downtown. The Residential Demand Analysis concluded that Downtown Maryville could support an additional 60 market rate rental housing units. The Analysis also concluded that the City overall could support additional affordable rental units; 43 family affordable units, and 23 senior affordable units.

Downtown Maryville presents an interesting housing market, where the existing stock of residential units within the DREAM Study Area tend to suffer from poor maintenance. This lack of maintenance is primarily the result of the buildings' use as student rental housing as students tend to be more tolerant of poor housing conditions. There are properties within the Study Area and surrounding areas that are in excellent condition and provide large single-family residences. Therefore the conflict between the poorly maintained rental housing and the larger, more stately and well maintained homeownership properties is very evident. There are some upper floor residential units in commercial buildings that tend to be student rental housing as well.

The average residential sales price was $120,000 with home prices ranging from $25,000 to $200,000. The market rate for existing rental units is between $300 and $425 for a one bedroom unit and $400 to $550 for most two bedroom units. The rent range for three and four bedroom units is between $500 to $1,200.

Most of the upper floors of the commercial buildings in Downtown Maryville are occupied with rental apartments or offices. There are no nearby large tracts of vacant land and few buildings suffering from extreme deterioration. For these reasons, the opportunity to produce additional housing in Downtown Maryville are very limited.

The City of Maryville can improve the existing housing stock by developing assistance programs that focus on home maintenance and education of tenants (students) and landlords. With the majority of Downtown housing being student rental housing, the City can take steps to encourage this market to demand high quality housing and assist landlords in meeting this demand. The university should be included in this effort and help promote acceptable, off-campus, housing options.

The City should be aware of opportunities to develop housing options near Downtown to address future housing demand. As Downtown revitalizes, housing demand will increase; and it is important to keep this source of residents and shoppers close to the core of the City. Strengthening the existing residential market in and around Downtown will provide immediate results by tapping into the existing consumer base.

CONSUMER SEGMENTS

Specific strategies will meet the needs of specific consumers. To help identify existing consumer segments and gain a better understanding of their needs, five categories of consumers of Downtown services are reviewed:

Downtown Employees

- Downtown is home to about 1,600 employees and 175 businesses.
- This segment's potential retail spending can be estimated as follows:
  1,600 x $15 weekly = about $1.25 million annually.
- Typically have a large demand for restaurants and food services at lunch and early evenings.
- Additional large demand for convenience items and shopping during work commute to and from Downtown.
- Frequent shopper reward programs and repeat business marketing efforts are effective for this user segment.

Downtown Residents

- There are 469 residents in Downtown Maryville.
- The comprehensive buying demands of this segment can be greatly served with retailer product differentiation and improved store hours.
- Frequent shopper reward programs and repeat business marketing efforts are effective for this segment.

Northwest Missouri State University (NWMSU) Students

- There are approximately 6,500 students enrolled at NWMSU, located just four blocks west of Downtown.
- There are about 3,000 on-campus residential units.
- This segment contains elements of both Downtown Employees and Downtown Residents segments, but with less potential spending power.
- Typically have a large demand for restaurants and entertainment options, both in the evening and on weekends.
- Frequent shopper reward programs and repeat business marketing efforts can be effective for this segment, but store loyalty is generally driven by product pricing and need.
- This segment is also heavily influenced by word-of-mouth references.

Local Residents

- Larger segment than Downtown Residents, with the PTA population of 17,692.
- Local residents use Downtown for many reasons, including conducting business with government offices, the post office, or businesses, dining, and shopping.

- Although shopping and dining is often not the primary reason for residents to go to Downtown it serves an important purpose and increases foot traffic.
- This segment is a lucrative merchandising opportunity, especially for impulse spending, due to the frequent number of visits.
- An effective strategy for this segment is to appeal to community loyalty through "shopping local" campaigns.

Tourists - Visitors

- Visitors tend to look for unique experiences and products.
- This segment has a greater demand for entertainment options, as well as a need for convenience items that travelers require.
- For Downtown Maryville, a large portion of this segment is related to visitors of NWMSU, such as family and friends of students.
- This segment is also very dependent upon lodging operators as an information source. Effective strategies for this segment will involve local lodging options.

COMMUNITY SURVEYS

The DREAM Community/Consumer Survey task conducted for Maryville included focus groups, a telephone survey, and a visitor survey. The results of this task provide important planning information for other DREAM tasks and are a source of data regarding local consumer behavior. The survey results offer insight into the community's desire for additional retail, restaurant, and entertainment services and help to uncover other issues relevant to retail development in Downtown Maryville.

In the spring of 2008, five focus groups were conducted to gather initial information about Downtown Maryville. The groups consisted of the Campaign for Community Renewal members, administration, elected officials, and government directors, Downtown business owners, long-time residents, and new residents. Some important information obtained from the focus group sessions that is relative to this Retail Market Analysis includes:

- Maryville is the home of NWMSU, which makes it home to approximately 6,500 students for 9 months of the year.
- Participants felt that Maryville is a central hub for northwest Missouri and southern Iowa, attracting employment and shoppers from the northeast Missouri, southeast Nebraska, and southwest Iowa areas.
- A divided highway has improved access to Maryville from St. Joseph, Missouri.
- Downtown has lost businesses to the south side of town.
- Although the main shopping area of the South Strip includes Walmart and several chain stores, the groups felt that most Maryville residents and students do their

shopping outside of Maryville.

- Participants did not characterize Downtown as a major shopping area, but did note several independent restaurants and bars for entertainment.
- Downtown Maryville's retail business hours typically end at 5:00 PM during the week, and most stores have limited weekend hours, which makes shopping difficult for residents that do not work Downtown.
- Participants felt that Downtown has some issues with user–friendliness, including parking, navigation and signage, and business hours.
- Participants felt there are problems with the college students that patronize the bars regarding parking, safety, and litter.
- Participants felt that a greater variety of restaurants, shops, and entertainment options is critical for Downtown. Smaller shops carrying items such as clothing, shoes, a breakfast restaurant, groceries, and baked goods were suggested.
- Participants felt that Downtown should not try to compete with Walmart and large chains, but to offer a unique shopping experience.
- Participants felt that new businesses would also attract new residents and cause building improvements, improving the aesthetics of Downtown.
- Participants felt small businesses should be encouraged through the establishment of an economic development incentive.

Upon completion of the Focus Groups, the DREAM Initiative conducted a Community Telephone Survey in the summer and fall of 2008. The purpose of the Telephone Survey was to verify perceptions of Downtown obtained through the Focus Group task and to further determine community desires for Downtown. Important insights obtained from a review of the survey results relative to retail development includes:

- Respondents indicated they most often visited Downtown for "government services/post office" (73%), "conducting business" (68%), "dining" (65%), and "shopping" (51%).
- Respondents indicated they least often visited Downtown for "outdoor recreation" (36%) and "entertainment" (37%).
- Almost 47% of respondents visited Downtown more than 5 times a month, with almost 84% indicating they visited at least once a month.
- Newer residents of Maryville indicated they were more likely to shop Downtown than did other residents.
- Younger respondents indicated they were more likely to use Downtown for dining and entertainment than did other residents.
- Wealthier respondents indicated they were less likely to use Downtown for entertainment than did other residents.
- Wealthier respondents were less likely to rank the existing business mix very high.

- Newer residents of Maryville were more likely to place a high priority on attracting "lodging, such as a hotel, motel, or bed and breakfast."
- Newer residents and wealthier respondents were more likely to place a high priority on attracting an "ice cream shop/soda fountain."
- Older respondents were more likely to place a high priority on attracting "art galleries and shops" and a "coffee shop."
- Wealthier respondents were more likely to place a high priority on attracting "Upscale Dining."
- Younger respondents were more likely to place a high priority on attracting "bars/nightclubs", although this business type was still one of the least desired for Downtown with less than 19%.

Information from the Telephone Survey will help in determining what adjustments to the Downtown Maryville retail mix could be effective. Strategies are formed to help Downtown develop greater appeal to residents who most frequently use it and have the greatest potential for spending their disposable income.

The DREAM Community/Consumer Survey task concluded with a Visitor Survey conducted in 2009 through early 2010. Nearly 600 responses were gathered by Maryville volunteers for the report. Maryville residents were excluded from the survey, although a large amount of NWMSU students did respond. The students can be considered "long-term" visitors and provide valuable insight regarding their impact on Downtown Maryville. Findings obtained from the Visitor Survey that are relevant to retail development include:

- About 95% of respondents indicated they had visited Downtown before, with 65% indicating they visit at least once a month.
- In spite of the proximity of the University, 12.3% of the students that responded still indicated they visit Downtown Maryville less than once a month.
- 83% of respondents indicated they were staying overnight, but only 15% of those were staying in a hotel/motel/bed and breakfast. A large number of these responses were from students staying in their housing.
- Wealthier respondents who were staying overnight, tended to be more likely to stay in a hotel, motel, or bed and breakfast.
- Visitors primarily indicated they were in Downtown for "dining" (83%), "nightlife/ entertainment" (65%), and "shopping" (58%).
- Younger visitors were more likely in town for shopping or dining than older visitors.
- Wealthier, older visitors were less likely to visit Downtown for nightlife and entertainment opportunities.
- Younger visitors found parking and business hours lacking in convenience. Student visitors found parking more of a problem.

- Non-student visitors tended to indicate more of a desire for restaurant variety than did other visitors.
- Older respondents tended to place a higher priority on attracting a fine dining restaurant than younger respondents.
- Both student respondents and non-student visitors ranked "a restaurant serving breakfast" as a top business to attract to Downtown. Additionally, a "coffee shop" was indicated also, making a Coffee shop/breakfast restaurant a clear first choice for a business to attract.
- "Clothing stores" and more general retail variety were ranked highly by respondents.
- Non-student visitors were almost three times more likely to spend over $100 on their visit than were student respondents.
- Many visitor responses, primarily those from students, indicated the City's streets and roads are not maintained well and should be the top priority for improvements.

CONCLUSIONS FROM SURVEY DATA

It is important to consider the survey data in developing retail strategies for Downtown Maryville. An effective strategy will capitalize on the existing consumer and retail business base, while simultaneously attempting to attract additional consumers and new retail businesses. For example, the influence of the NWMSU student market cannot be overlooked, but they generally do not have the disposable income of other visitors or residents. A strategy that strikes a balance in meeting the needs of these two markets should be successful. According to the survey data, some conclusions are:

- Greater restaurant variety will benefit all consumer markets, but the addition of a breakfast restaurant should be the top priority.
- Events that attract the NWMSU students and encourage family participation can provide a vibrant setting and also attract other visitors. The students will ensure good attendance and can be attracted to events oriented toward food and art.
- Although the University is close, Downtown Maryville could be a better job at capturing the student market. Advertising campaigns and a closer relationship with the appropriate University departments should be developed.
- Street and road maintenance is lacking and must be improved to provide a positive experience for visitors to the City.
- The student population is the primary market for the bars and nightclubs in Downtown, but the student responses indicate that more such establishments are not needed. This indicates that these businesses are likely meeting all available demand for this service and no expansion is required at this time.
- Downtown store hours during the week and weekends and parking may require improvements. Some market segments are inconvenienced by these existing elements and adjustments to better fit peak shopping hours may be needed.

- Promotions that target student's families and friends and university alumni and employees can also be effective.
- Downtown Maryville's businesses should capitalize on activities at the University.

With additional comparison of each survey instrument, an overall picture of commonly desired businesses for Downtown Maryville emerges. However, the expressed desires of survey respondents are not tied to actual unmet retail demand; rather, they are a reflection of community and visitor opinions. With the added support of the unmet demand analysis, these types of businesses become effective targets for attraction that demonstrate demand and community acceptance.

The DREAM Community/Consumer Survey information indicates a strong preference for the following businesses in Downtown Maryville:

- Family & Casual Dining – Family, Breakfast, Coffee Shops, Restaurants and Outdoor Café's
- Clothing Stores – Men, Women's and Children's Clothing, Shoes and Accessories
- Farmer's Market
- Entertainment Options
- Bookstore
- Art Galleries & Other art related Stores
- Boutique & Specialty Shops

Figure 4 below, identifies the highest priorities for the Focus Group, Community Telephone Survey, and Visitors Survey Respondents.

<u>Figure 4: Downtown Priorities</u>

DOWNTOWN BUSINESSES

Focus Groups	Community Phone	Visitor Survey
Casual Dining	Casual/Family Dining	Entertainment
Breakfast Dining	Breakfast Dining	Live Music
Farmer's Market	Clothing Stores	Casual/Family Dining
Clothing Stores	Bookstore	Upscale Dining
Entertainment	Farmer's Market	Bars & Nightlife
Art Galleries & Shops	Upscale Dining	Community Theatre
Bookstore	Coffee Shop	Art Galleries & Shops
Boutique/Specialty	Boutique/Specialty	Bookstore
Coffee Shop	Ice Cream Shop/Soda Fountain	Farmer's Market
Sandwich Shop	Art Galleries & Shops	Boutique/Specialty

BUSINESS MARKET

The City of Maryville and the surrounding area have a diverse local economy providing stability and a solid base for future economic development. Economic development efforts should continue to be an important part of Maryville's urban growth strategy. Table 9 illustrates the total employment in 2010 for the Trade Areas.

TABLE 9: 2010 TOTAL EMPLOYMENT

	Downtown Maryville	Primary Trade Area	Secondary Trade Area
Employees	1,595	9,966	19,387
Businesses	177	829	2,294

The employment mix by industry in the City of Maryville closely mirrors that of the STA and the surrounding region. Downtown Maryville has the highest concentration of jobs in the retail sector. The percentage of retail jobs in Downtown (30%) is higher than that of the PTA (21%) and the STA (29%). The PTA and STA have the highest concentration of jobs in the service sector. Although most of Downtown's jobs are in the retail sector, there are a large number of jobs in the Finance, Insurance and Real Estate (13%), and Government(17%) sectors. The largest employers in the City include:

TABLE 10: MARYVILLE EMPLOYERS

Company Name	Industry	Employment
Kawasaki Motors Mfg Corp Usa	Outdoor Power Equipment Stores	1000
Northwest Missouri State Univ	Colleges, Universities, and Professional Schools	876
Energizer Battery Inc	Electric Equip & Wiring Merchant Whols	798
St Francis Hospital	General Medical and Surgical Hospitals	400
Walmart Supercenter	Department Stores (except Discount Department Stores)	290
Hy-Vee	Supermarkets and Other Grocery (except Convenience) Stores	250
Deluxe Shared Mfg	Stationery and Office Supplies Merchant Wholesalers	230
Maryville Treatment Ctr	Legislative Bodies	214
ARAmark	Other Direct Selling Establishments	200
Federal-Mogul Corp	Sheet Metal Work Manufacturing	190
Applebee's Neighborhood Grill	Full-Service Restaurants	150

COMPARATIVE MARKET ANALYSIS

Downtown Maryville competes for retail customers in a very competitive local and regional market. The regional retail market is dominated by the offerings in St. Joseph, Missouri, approximately 45 miles south; and Kansas City, Missouri; about 100 miles south.

Locally, the retail stores along the highway 71 corridor to the south of Downtown include a wide variety of chain stores and name brand merchandise. This "South Strip" area has developed around pockets of large retail such as Walmart, Sears, and J.C. Penney. Other chain retail stores in this corridor include Dollar General, Sutherland's, Hy-Vee Grocery, Hibbett Sports, and Walgreens Pharmacy.

The South Strip, as well as more distant shopping areas, compete with Downtown Maryville for retail consumers. Large retail areas offer the auto-oriented shopping experience which has defined the modern American retail development: high volume of goods and merchandise, easy access, high visibility, and excessive parking. However, these same retail environments have a general lack of architectural character, lack of pedestrian environments, lack of social experiences and limited personal service. Downtown Maryville can provide all of these amenities.

TENANT MIX & LAND USE

Table 11 below, illustrates information collected during the DREAM Land Use, Building, and Infrastructure Survey task. The Land Use, Building, and Infrastructure Survey was conducted in 2008, and recent real-estate vacancy information was obtained for this Retail Market Analysis and verified with the community.

TABLE 11: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	53	53	60,689	0	0.0%
Multi-Family	20	26	44,467	0	0.0%
Sub-Total	73	79	105,156	0	0.0%
Commercial					
Office / Service	80	83	303,277	34,789	11.5%
Retail	18	22	63,051	13,737	21.8%
Restaurant	13	14	35,274	0	0.0%
Sub-Total	111	119	401,602	48,526	12.1%
Industrial	0	0	0	0	0.0%
Public / Institutional	22	24	101,954	0	0.0%
Recreation	1	0	NA	NA	NA
Parking Lot	18	0	NA	NA	NA
Vacant Lot	6	0	NA	NA	NA
TOTAL	231	222	608,712	48,526	8.0%

* Building Square Footage assumes that 80% of the building is usable.

* Building Square Footage is for 1st Floor.

Table 11 on page 22, also illustrates that there are 222 buildings located on 231 parcels in Downtown, representing a total of about 610,000 square feet of first-floor space with about 49,000 square feet of vacancy. The existing mix of this square footage, as determined by the most recent land use, is about 17% residential, 17% institutional, and 50% office/ service, 10% retail, and 6% restaurant. These numbers represent a baseline as Maryville attempts to adjust the Downtown business mix. There is no correct mix for successful downtowns, but a characteristic of a healthy downtown is a mix of retail businesses and services that encourage pedestrian, or “browsing-shopping”, types of activity.

The subject of this analysis is the restaurant/retail sector; represented by 36 buildings (16%) with about 98,300 square feet (16%) of first-floor space. Of this space, about 13,700 square feet is vacant and accounts for about 28% of the entire amount of Downtown vacancies. The 35,274 square feet of existing restaurant space and about 49,314 square feet of the retail space are currently generating taxable sales.

The 83 office / service buildings represent over 303,000 square feet of first-floor space with almost 35,000 vacant. This vacant space provides the opportunity for easy conversion into retail use. However, half of the existing square footage is currently in use as offices and services. The City should review the uses allowed under the zoning code and reconsider these and other Downtown uses, in the context of their contribution to positive pedestrian activity. For example, bail bondsmen generate pedestrian activity, but these customers are likely to discourage the Downtown shopping market. Conversely, a travel agency has the potential to generate more positive activity.

The total vacancy of 48,526 square feet of first-floor building space, is of immediate concern to attract new retail to Downtown. It may be possible and productive to encourage the conversion of non-retail space to retail use as existing vacancies are absorbed.

About 36% of first-floor Downtown buildings, or about 17% of the square footage, is in use as residences. The average single-family residence size is about 1,150 square feet, and the average multi-family building is about 1,700 square feet. Due to the large number of student residences in Downtown Maryville, vacancy information is unavailable. Proximity of residential uses to Downtown provides a stable base of consumers for businesses, although the amount of first-floor space used for existing housing in relation to the amount used for retail may be excessive. As noted, many of these residences are student households and are a very specific niche market from which Downtown businesses can draw.

The public / institutional buildings are a result of Maryville being the center of local and regional government and includes large structures such as the Nodaway County Courthouse and the Nodaway County Administration Building.

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MARKET RESEARCH FINDINGS

RETAIL ANALYSIS

A review of the DTA provides an idea of possible new and existing business potential. The DTA consists of 86 acres with 401,602 square feet of first-floor commercial and retail space. PGAV PLANNERS observed an estimated 84,588 square feet of first-floor space occupied as retail/restaurant use and an additional 48,526 square feet of vacant space. Existing occupied retail space (49,314 square feet) is generating about $9 million in annual sales (not including automobiles, gasoline stations, or non-store retailers) or about $182 per square foot. Existing occupied restaurant space (35,274 square feet) is generating $4.6 million in sales or $131 per square foot. Depending on the mix of attracted businesses, the 48,526 square feet of vacant space represents the potential for an additional $6 to $9 million in annual retail and restaurant sales.

Table 12 represents a summary of existing retail establishments in the DTA, PTA, and STA with information obtained from the State of Missouri. Table 13 on page 26, describes retail locations observed by PGAV PLANNERS. Information between State demographics and observed conditions may differ. The retail services listed in these tables are organized according to the North American Industry Classification System (NAICS). Using NAICS allows the report to compare retail activity by category and recommend specific retail uses and establishments to fit gaps in retail service. An illustration showing existing retail establishments is located in Appendix C.

TABLE 12: RETAIL ESTABLISHMENTS

	Downtown Maryville		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
Retail (Pedestrian Generating Businesses) Trade Summary	37	546	153	2,963	409	4,375
TOTALS:	35	550	134	2,730	375	4,020
Furniture & Home Furnishings Stores	1	2	6	18	11	28
Electronics & Appliance Stores	2	4	10	75	18	90
Bldg. Materials & Garden Equiptment & Supplies	1	9	14	1,069	36	1,191
Food & Beverage Stores	2	138	8	288	43	532
Health & Personal Care Stores	4	11	9	33	20	143
Clothing & Clothing Accessories Stores	1	1	7	26	12	36
Sporting Good, Hobby, Book & Music Stores	1	5	10	25	19	64
General Merchandise Stores	2	158	5	332	14	399
Miscellaneous Store Retailers	6	16	12	39	49	95
Arts, Entertainment & Recreation	3	30	12	88	38	229
Accomodation	0	0	4	52	15	94
Food Services & Drinking Places	12	176	37	685	100	1,119
Total Businesses (including non-retail)	177		829		2,294	
Total Employees (including non-retail)	1,595		9,966		19,387	
Total Residential Population	469		17,692		43,704	
Employee/Population	3.40		0.56		0.44	

TABLE 13: EXISTING RETAIL

Building Materials & Supply	Maryville Lumber
Health & Personal Care Stores	Hair Clinque
	LaChic Salon
	Looks Salon & Day Spa
Sporting Goods & Hobby Stores	Jocks Nitch
Book, Periodical, and Music Stores	Antique & Books
Office Supplies, Stationery, and Gift Stores	Accent Printing & Express Solutions
	C&G Education Station
Miscellaneous Retail	Finish Line Gas Station
	Smokes 4 Less
	Store of Colors
	Maryville Tools
	Nodaway Glass
	Northwest Opry
	Moviemaker
	Metal's Edge Expo
	Castways
	Two Dollar Bill's Variety Store
	North Side Mall
	Movie Magic
	Durny's
	Store of Colors
	Bittersweet Floral
	Vacuum Center
	Student Body
	Cobbler Cottage
	Maryville Florist
	Birds Bait
	Bows Bows
Used Merchandise Stores	Northwest Pawn Shop
	Thrift Shop
Food Services & Drinking Places	Subway
	Happy Garden
	The Outback
	The Palms
	Molly's Sports Bar
	Dominos
	The Pub
	Carson's Bar & Grill
	A&G Grill
	Mr Goodcents
Auto Parts, Accessories, and Tire Stores	Car Quest Auto Parts

Spending habits of the consumers in the trade areas form the basis for the determination of retail demand. Estimating average household spending per retail sector provides insight into the demand for particular retail services within a given trade area. Table 14 shows household annual consumer expenditures for seven main categories and several sub-categories of retail expenditures.

TABLE 14: CONSUMER EXPENDITURES

	Downtown Maryville	Primary Trade Area	Secondary Trade Area
Average Household Income	$31,467	$42,370	$39,696
Average Annual Household Expenditures for Selected Retail Sectors			
Food	**$4,569**	**$5,818**	**$5,431**
Food at Home	$2,609	$3,399	$3,249
Food Away from Home	$1,961	$2,419	$2,183
Apparel and Services	**$1,041**	**$1,244**	**$1,095**
Household Merchandise	**$1,540**	**$1,992**	**$1,856**
Electronics	$879	$1,093	$1,003
Household Goods	$661	$900	$853
Household Care	**$865**	**$1,448**	**$1,388**
Transportation	**$2,255**	**$3,017**	**$2,947**
Health & Personal Care	**$560**	**$838**	**$870**
Health Care	$329	$541	$593
Personal Care Products	$231	$298	$277
Entertainment & Recreation	**$1,013**	**$1,464**	**$1,447**
Total for selected sectors	**$11,843**	**$15,821**	**$15,033**

The PTA has the highest Average Household Income and spends the most total dollars on selected retail activities. Of these selected categories, the trade areas spend about 37% of income on food, with 40% of food expenditures on food away from home. The PTA spends the highest dollar amount on food. The Downtown Maryville retail trade areas spend about 8% of income on apparel, 13% on merchandise, 5% on health & personal care, and 9% on entertainment and recreation. The DTA spends less total dollars than the PTA or STA on all categories.

The DTA spends about 7% of income on household care, while the PTA and STA spend slightly more at 9%. If residents could be encouraged to increase spending in this area, the effect should be visible as improved housing conditions.

All trade areas spend about 19% of average household income on transportation. This is a significant amount of income that improved public transportation might be able to reduce; freeing income for other uses.

Tables 15 and 16 below, depict Maryville's potential purchasing power. Table 15 shows the number of households at regular income thresholds, while Table 16 clarifies this idea by demonstrating disposable income, obtained from the U.S. Census Bureau, for each trade area in the same intervals.

TABLE 15: HOUSEHOLD INCOME

Income Level	Downtown Maryville	Primary Trade Area	Secondary Trade Area
Less than $ 15,000	67	1,183	2,897
$ 15,000 - $24,999	44	730	2,195
$ 25,000 - $34,999	38	725	2,181
$ 35,000 - $49,999	46	1,228	3,197
$ 50,000 - $74,999	50	1,638	3,871
$ 75,000 - $99,999	18	635	1,484
$ 100,000 - $149,999	11	384	827
$ 150,000 - $199,999	0	91	140
$ 200,000 +	0	62	128
Total	274	6,676	16,920

TABLE 16: DISPOSABLE INCOME

Income Level	Downtown Maryville	Primary Trade Area	Secondary Trade Area
Less than $15,000	76	1,334	3,392
$15,000-$24,999	52	901	2,682
$25,000-$34,999	50	1,092	3,023
$35,000-$49,999	40	1,342	3,334
$50,000-$74,999	41	1,434	3,304
$75,000-$99,999	11	284	629
$100,000-$149,999	4	219	410
$150,000-$199,999	0	29	57
$200,000+	0	41	89
Total	274	6,676	16,920
Median Disposable Income	$26,310	$35,080	$32,289
Average Disposable Income	$32,245	$41,868	$39,378

The PTA has the highest percentage (9%) of households with a disposable income over $75,000. The DTA has the highest percentage (47%) of households with a disposable income of less than $25,000. Determining retail sectors with unmet demand and targeting households with disposable income will not only help Downtown retain retail sales, but also to attract businesses that can meet demand in the PTA and STA.

POTENTIAL STORE SPACE SUPPORTED

While Maryville 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 is not being met. Understanding this unmet demand reveals an opportunity for Downtown Maryville to capture more retail spending and strengthen its retail sector.

In Table 17 below, unmet demand (the difference between retail demand and actual sales) is listed for the retail categories demonstrating the greatest opportunity. These categories do not include Department Stores and Grocery Stores. Although these categories demonstrate unmet demand, shifts in consumer habits and trends discourage large Downtown retail locations for these types of stores.

The categories of lawn and garden equipment and supplies and drinking places are not included, as they have demonstrated an excess supply. The City may wish to discourage stores offering products in these categories as there may not be enough demand to support new locations without drawing business from existing stores.

TABLE 17: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[2]
Full-Service Restaurants (NAICS 7221)	$11,603,194	88,574
Building Material and Supplies Dealers (NAICS 4441)	$5,911,331	32,480
Special Food Services (NAICS 7223)	$4,695,868	35,846
Furniture Stores (NAICS 4421)	$4,053,668	22,273
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$3,913,526	21,503
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$2,771,328	15,227
Clothing Stores (NAICS 4481)	$2,664,070	14,638
Limited-Service Eating Places (NAICS 7222)	$1,589,464	12,133
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$1,282,576	7,047
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$707,987	3,890
Home Furnishings Stores (NAICS 4422)	$592,381	3,255
Shoe Stores (NAICS 4482)	$581,365	3,194
Other Miscellaneous Store Retailers (NAICS 4539)	$575,966	3,165
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$552,212	3,034
Used Merchandise Stores (NAICS 4533)	$500,359	2,749
Beer, Wine, and Liquor Stores (NAICS 4453)	$424,274	2,331
Florists (NAICS 4531)	$237,439	1,305
TOTAL	$ 42,657,008	272,644

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

[2] Based on $182 in retail sales per square foot, $131 in restaurant sales per square foot, and existing retail building inventory and activity in Downtown Maryville.

Given the total unmet retail demand within the STA and the average sales per square foot ($182 for retail, $131 for restaurants), Downtown Maryville could support an estimated 272,644 square feet of additional retail / restaurant space in the specified retail sectors. Existing retailers could capture this unmet demand by expanding floor area and new products, or new retailers could be attracted. Downtown Maryville has few areas where new retail buildings could be developed, but has the potential to fill the existing vacant square footage with new retail. Downtown also has existing retailers that could potentially expand or adjust their product lines to accommodate some of the unmet demand.

While the existing vacant space (48,526 square feet) will address some of the unmet demand, the retail potential is even greater (272,644 square feet). As vacant space is occupied, the City of Maryville should encourage existing offices and service businesses to relocate operations to upper floors or side streets. Incentives such as the Nodaway County Economic Development Revolving Loan Fund and adjustment to the Downtown zoning classification can help with this effort.

In 2010, sales from existing Downtown Maryville retail and restaurant locations totaled about $13.6 million. About $9 million in annual sales (not including automobiles, gasoline stations, or non-store retailers) was from retail locations and $4.6 million from restaurants. Maintaining this sales revenue base is important for Downtown Maryville, however attracting new businesses in retail sectors showing unmet demand will increase the market potential to attract new customers.

Some of the NAICS sectors can be grouped to show the areas of highest unmet retail demand upon which Downtown Maryville could capitalize. The groupings with the greatest potential include:

	Sales Opportunity	Potential S.F.
• Restaurants (Full-service/limited service/special):	$17.9 million	136,600 s.f.
• Building Material & Supply Stores:	$5.9 million	32,500 s.f.
• Furniture / Home Furnishing Stores:	$4.7 million	25,500 s.f.
• Clothing, Jewelry, & Shoes:	$3.9 million	21,700 s.f.
• Health & Personal Care Stores:	$3.9 million	21,500 s.f.
• Electronics & Appliance Stores:	$2.8 million	15,227 s.f.
• Office Supplies, Stationary, and Gift Stores:	$1.3 million	7,000 s.f.

Although unmet demand for a grocery is not considered as a primary retail business to attract, a small location that could serve the NWMSU campus could be successful selling more specialty foods. If such a store can include a bakery and breakfast café and host a farmer's market on its parking lot, numerous needs and demands are being met with one business in Downtown.

The community survey conclusions support restaurant demand as the top priority for Downtown business attraction and expansion. The community survey respondents had special interest in improving restaurant variety, a 24-hour breakfast/coffee shop, and outdoor cafés. An expansion of the restaurant market will generate more shopping activity for all retail sectors. The unmet demand demonstrated for special food service businesses includes catering halls and banquet facilities. Addressing this demand provides additional Downtown pedestrian activity.

Although not mentioned in the community surveys, the unmet demand shown in building material and supply stores of nearly $6 million is important to address. However, stores in this category tend to use larger spaces due to the size of the building supplies. Downtown is also home to an existing building supply company, Maryville Lumber, that may be able to adjust its products to better meet this demand.

Furniture stores were combined with home furnishings to suggest a store selling these similar products could develop a more effective retail draw than a stand-alone furniture or home furnishings store. A high quality furniture store has potential to be an anchor in Downtown and will also appeal to residents and visitors. This type of store could also be advantageous for the university population as the students move in and out each year. However, it is important that the store does not become a used furniture store or consignment shop only frequented by the students. High quality merchandise also has the ability to satisfy the boutique and specialty aspects that shoppers desire, particularly when combined with home furnishings as previously suggested.

Clothing stores demonstrate a large amount of unmet demand and are combined with jewelry, luggage, leather goods, and shoes. This type of store can be located within existing vacant buildings, and should include boutique-style shops that offer a variety of clothing products as well as accessories.

Unmet demand for products in health & personal care can improve the retail mix with businesses that will appeal to residents as well as visitors. Stores in this sector include pharmacies, but also stores that carry products such as cosmetic and beauty supplies, perfumes, optical goods, and nutritional supplements. Smaller stores of this type can occupy existing vacant spaces, with larger stores having potential to be Downtown anchors.

Electronics and appliance stores could be combined with furniture stores, but this analysis will consider this sector separately. These stores usually include a showroom, which tends to increase the size of the building space required, and appeals to both residents and visitors. A large store of this type can be a very successful anchor. Sales per square foot will vary according to the types of electronics and appliances sold.

Office supply, stationary, and gift stores also demonstrate some unmet retail demand in Downtown Maryville. These types of stores are not generally found in small footprints, however a gift store in Downtown provides an important outlet for general items that may be of interest to tourists and other visitors. Existing retailers should be encouraged to expand their floor area to satisfy the unmet demand for products in this category.

Existing Downtown businesses have the potential to expand their product line and tap into a few other categories of unmet demand. Table 17 on page 29, shows a smaller amount of unmet demand in the areas of miscellaneous store retailers, sporting goods/ hobby/musical instruments, used merchandise, beer, wine and liquor, and florists.

AVAILABLE RETAIL SPACE INVENTORY

The DREAM Land Use, Building, and Infrastructure Survey task conducted in spring of 2008 identified 1st floor vacancies. PGAV PLANNERS updated the vacancy inventory in summer of 2010 in preparation of the Retail Market Analysis. Table 18, below, shows existing 1st floor vacancies. Existing vacancies are also illustrated on the map in Appendix D.

TABLE 18: 1ST FLOOR VACANCY

ID	Address	Available Sq.Ft.
1	424 N. Main St.	2,500
2	221 W. 4th St.	4,022
3	322 N. Buchanan St.	1,384
4	116 W. 4th St.	1,133
5	114 W. 4th St.	6,930
6	320 N. Main St.	4,594
7	314 N. Main St.	2,165
8	121 W. 3rd St.	4,153
9	119 W. 3rd St.	1,980
10	309 N. Market St.	2,959
11	118 W. 3rd St.	1,100
12	120 W. 3rd St.	1,253
13	124 W. 3rd St.	3,484
14	120 E. 2nd St.	6,597
15	104 S. Main St.	3,194
16	106 S. Main St.	1,078
	TOTAL	48,526

These 16 ground floor, storefront, vacancies represent the retail opportunity for Downtown Maryville with a total of 48,526 square feet. Several vacant locations can accommodate an anchor-type business such as a furniture store or a restaurant. Other smaller vacancies represent the opportunity for attracting boutique and specialty stores. As noted, Downtown Maryville should initially focus on filling current vacancies, but encourage the relocation of services and professional offices to upper floor spaces and along side street to make more prime retail space available.

This report matches the locations of the above 16 development opportunities with suggested types of retail businesses and considers the size, geographic location, and proximity of the vacancy to other Downtown businesses. Table 19 below, lists the retail suggestions for each opportunity, while figure 5 on page 35 illustrates the geographic locations of the vacant spaces.

Just over 12,700 square feet (26%) of existing vacant space is suggested for restaurant use throughout Downtown Maryville. Restaurants have been identified as having the highest unmet demand amount for the Maryville trade areas and a greater variety was reported as a top priority from the community survey task. In particular, attracting a restaurant that serves breakfast was desired.

About 8,200 square feet (17%) is suggested for electronics & appliance stores at two locations. Being along one of the main routes to campus, the location at 221 W. 4th Street (Number 2 on Figure 5, Page 35) has the potential to provide important retail services to students as they travel to and from the university.

TABLE 19: POTENTIAL NEW RETAIL

ID	Address	Available Sq.Ft.	Potential Retail
1	424 N. Main St.	2,500	Full-Service Restaurant
2	221 W. 4th St.	4,022	Electronics & Appliance Store
3	322 N. Buchanan St.	1,384	Sporting Goods, Hobby & Musical Instruments
4	116 W. 4th St.	1,133	Building Materials & Supplies
5	114 W. 4th St.	6,930	Building Materials & Supplies
6	320 N. Main St.	4,594	Full-Service Restaurant
7	314 N. Main St.	2,165	Full-Service Restaurant - Breakfast Diner
8	121 W. 3rd St.	4,153	Electronics & Appliance Store
9	119 W. 3rd St.	1,980	Jewelry, Luggage & Leather Goods
10	309 N. Market St.	2,959	Health & Personal Care Store
11	118 W. 3rd St.	1,100	Clothing Store
12	120 W. 3rd St.	1,253	Shoe Store
13	124 W. 3rd St.	3,484	Full-Service Restaurant
14	120 E. 2nd St.	6,597	Funiture Store
15	104 S. Main St.	3,194	Home Furnishings
16	106 S. Main St.	1,078	Office Supply, Stationery & Gift Store
	TOTAL	48,526	

The buildings at 114 to 116 W. 4th Street (Number 4 & 5 on Figure 5, on page 35) represent 8,000 square feet (17%) of vacant space that was previously used as a car dealership. This space could satisfy the unmet demand in the building materials & supplies category.

A large development opportunity exists at 120 E. 2nd Street (Number 14 on Figure 5, on page 35). This, fully vacant, building is nearly 6,600 square feet and is more warehouse than storefront. The two-story building could house a furniture store on the ground floor, with residential space on the upper floor. Incorporating mixed-use projects into the business mix is essential for a vibrant Downtown atmosphere, and this property presents a unique opportunity to do so.

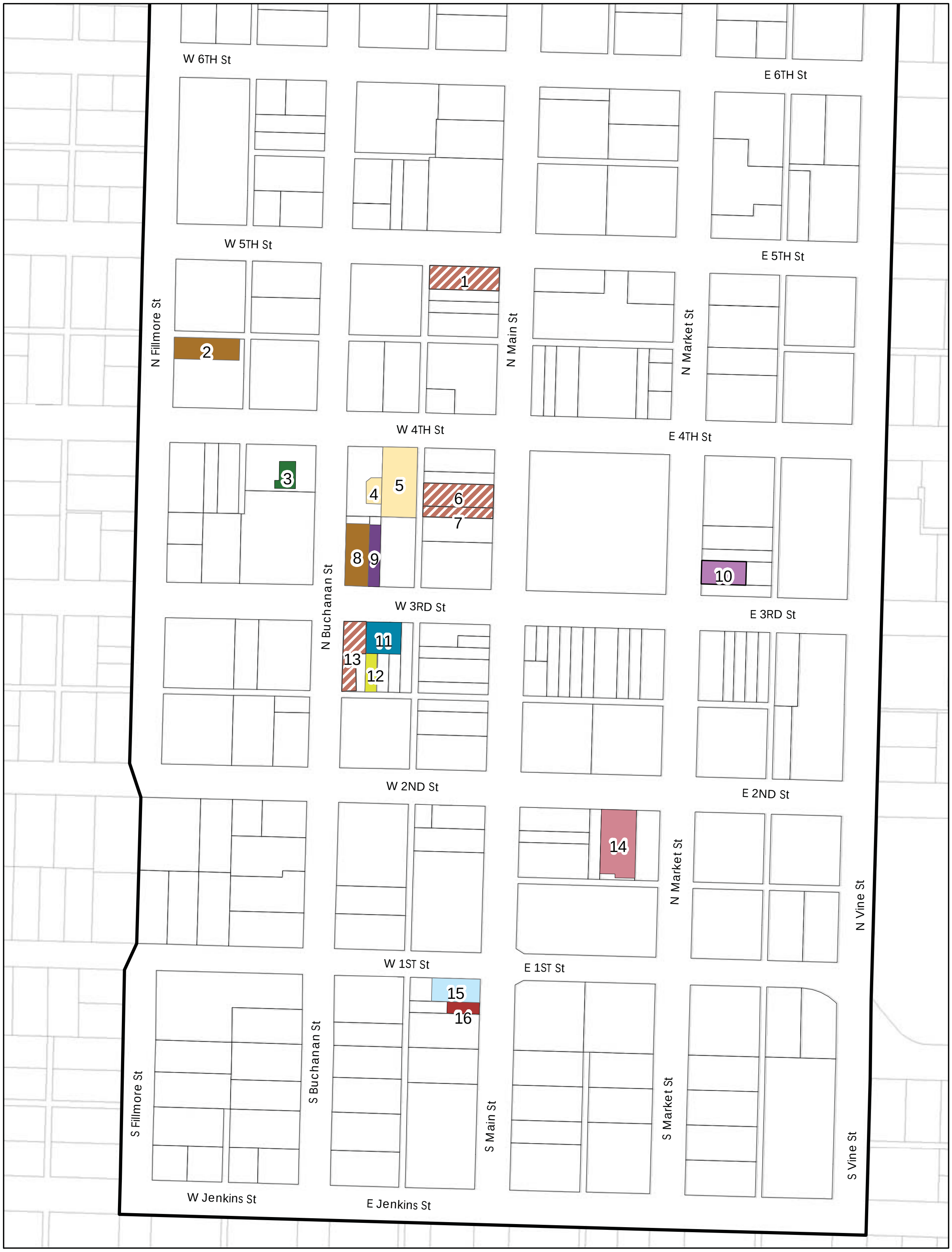
Some other suggestions for vacancies represented in the illustration on Figure 5, page 35 include, a sporting goods/hobby shop in an old gas station, a clothing store, shoe store, and jewelry store on W. 3rd Street, a gift store on S. Main; the approach into Downtown, and restaurant uses along N. Main on the courthouse square to include the breakfast diner. All of these stores will contribute to the boutique and specialty store feel of Downtown.

Table 20 below, compares each suggested retail category with identified unmet demand and available, allocated, Downtown space. The allocated space does not account for possible additional retail demand absorbed by existing retailers.

TABLE 20: POTENTIAL RETAIL SPACE ALLOCATION

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[1]	Suggested Allocated Vacant Space	Remaining Possible Retail Area
Full-Service Restaurants (NAICS 7221)	$11,603,194	88,574	12,743	75,831
Building Material and Supplies Dealers (NAICS 4441)	$5,911,331	32,480	8,063	24,417
Special Food Services (NAICS 7223)	$4,695,868	35,846	0	35,846
Furniture Stores (NAICS 4421)	$4,053,668	22,273	6,597	15,676
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$3,913,526	21,503	2,959	18,544
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$2,771,328	15,227	8,175	7,052
Clothing Stores (NAICS 4481)	$2,664,070	14,638	1,100	13,538
Limited-Service Eating Places (NAICS 7222)	$1,589,464	12,133	0	12,133
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$1,282,576	7,047	1,078	5,969
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$707,987	3,890	1,980	1,910
Home Furnishings Stores (NAICS 4422)	$592,381	3,255	3,194	61
Shoe Stores (NAICS 4482)	$581,365	3,194	1,253	1,941
Other Miscellaneous Store Retailers (NAICS 4539)	$575,966	3,165	0	3,165
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$552,212	3,034	1,384	1,650
Used Merchandise Stores (NAICS 4533)	$500,359	2,749	0	2,749
Beer, Wine, and Liquor Stores (NAICS 4453)	$424,274	2,331	0	2,331
Florists (NAICS 4531)	$237,439	1,305	0	1,305
TOTAL	$ 42,657,008	272,644	48,526	224,118

[1] From Table 17.



Legend

- Study Area
- Building Materials & Supplies
- Clothing Store
- Electronics & Appliance Store
- Full-Service Restaurant
- Home Furnishings
- Health & Personal Care Store
- Home Furnishings
- Jewelry, Luggage & Leather Goods
- Office Supply, Stationery & Gift Stores
- Shoe Store
- Sporting Goods, Hobby & Musical Instrument

Figure 5
Potential New Retail

Retail Market Analysis
City of Maryville , Missouri

PGAVPLANNERS

D·R·E·A·M

DOWNTOWN MARYVILLE RETAIL GOALS

- STRENGTHEN EXISTING BUSINESSES

  Existing businesses in Downtown have had success and are meeting much of the retail sales potential. The Campaign for Community Renewal (CCR) and Chamber should initiate programs to enhance the profitability of Downtown merchants. Some of Downtown's retailers have been in business for many years and could benefit from fresh ideas, information regarding the changing retail landscape, and a support structure with which to discuss their issues and needs. Additionally, CCR should initiate all strategies involving business promotions, marketing, events, and workshops. Attention to existing businesses concerns through a formal program is a low cost way to build loyalty, goodwill, and a dynamic business core.

- IMPROVE THE QUALITY OF EXISTING RETAIL BUSINESSES

  Many existing retailers cater to the Northwest Missouri State University student market. This is an important business strategy, but students are not generally very discerning or demanding and they usually have little disposable income. A business that relies on this market too much risks becoming a "college hangout" and may lose appeal for other visitors and residents. Often store and product quality declines as students are typically concerned only with retail costs. CCR should encourage merchants to focus on aesthetics and products of interest to a variety of customers. CCR can also develop Bar Watches and Good Neighbor agreements to discourage rowdy nighttime behavior.

- ENCOURAGE EXISTING RETAIL EXPANSION

  It is important to understand that consumers will travel greater distances for a better choice in variety. With Maryville's proximity to the wide variety of products offered in St. Joseph and Kansas City, Missouri, it is critical that Downtown demonstrate a good variety of shopping, dining, and entertainment options. Downtown can broaden its retail variety by encouraging existing retailers to address categories of unmet demand as identified in Table 17 on page 29. These areas represent opportunities for local businesses to expand sales floors or add product lines. Additionally, merchants in areas that show little unmet demand, or an overabundance of supply, should consider adjusting their product lines or services.

- ENCOURAGE TARGETED RETAIL USES

  The City can also seek to attract new businesses providing products and services in the areas of unmet demand as identified in Table 17 on page 29. The ground floor of all mixed-use and commercial buildings in Downtown, particularly those on the Courthouse Square, should house these uses and other pedestrian generating activities. The CCR, working with the City and Chamber, should develop a list of targeted businesses to solicit for attraction and develop appropriate information for marketing Downtown to these businesses.

- INCREASE AVAILABLE RETAIL SPACE

  As Downtown vacant space is absorbed, the City should seek to relocate ground floor offices and other non-retailers to upper floors or side streets; particularly along Main Street and the Courthouse Square, where pedestrian-generating retail should be the most prominent type of business. Adjustments to Downtown zoning codes or requirements tied to the Nodaway County Economic Development Revolving Loan Fund can help encourage these business relocations.

- COLLECTIVELY MARKET DOWNTOWN RETAILERS

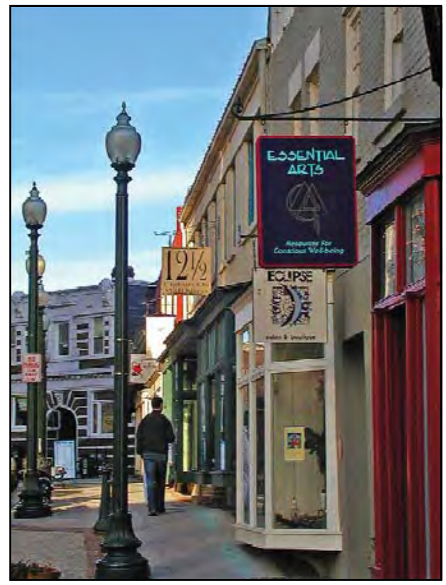
  Downtown Maryville competes in a crowded marketplace. The retail consumers in the trade areas have a choice of shopping areas. Downtown should develop a brand that emphasizes its strengths as a unique shopping area. The Downtown brand must then be communicated to the marketplace. The CCR should initiate advertising campaigns, promotions, and events that will support the brand and market Downtown as a whole, just as any large shopping center would. Information about existing stores, new stores, hours of operations and special events is a cost effective approach to convey the image of Downtown and increase awareness.

- CREATE DOWNTOWN EVENTS HAVING APPEAL TO NWMSU STUDENTS

  The CCR should develop events to raise the visibility of Downtown as a shopping and entertainment destination. The scheduling of these events is important. During the summer months, there will be fewer students in attendance and more residents or visitors. As is similar to the issues with a business becoming a college hangout, an event needs to strike a balance between student and non-student attendance. Students provide an exciting atmosphere, but may inundate an event and cause a reputation that is unfriendly to families and visitors. It is important to understand that some events may not appeal to students. Sidewalk sales and window display contests are generally not appealing to the limited income student and may require another draw. Music and food are always attractive elements to add to any event. An event with alcohol should always include food and end earlier in the evening. Suggested events are included in the Events strategy on page 49.

Downtown Maryville Strategies

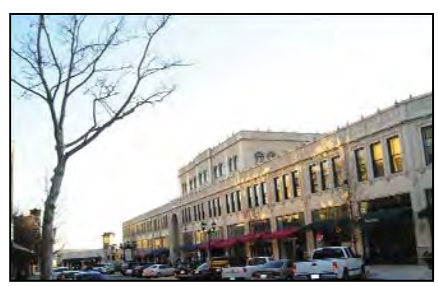
The achievement of Downtown's retail goals can be obtained by implementing several key strategies. These strategies are realistic and based on an understanding of Downtown Maryville's current retail market, primary customers, and spending potential of key customer segments identified earlier in this analysis. Implementing these strategies will work in concert with other objectives throughout the DREAM Initiative to create a vibrant Downtown Maryville.



Re-energizing downtown is a difficult, lengthy, and complicated process. Traditional downtowns have struggled to keep up with dramatic changes in consumer lifestyles, spending patterns, merchandising techniques, technology, and increased competition for retail and restaurant spending. To achieve long-term success, Downtown stakeholders must understand these changes and embrace new approaches to retail development.

Great Streets Equal Great Downtowns

Great neighborhoods and downtowns succeed because of the places and features within them. It is these small places that define a downtown and reveal the richness and depth of its social life. The best downtowns emerge when communities are guided first and foremost by a vision of what they want to see in their downtown. Every neighborhood has the capacity to evolve into a great destination. This happens when local people feel a sense of ownership, which extends beyond property lines to include private and public partnerships. These partnerships, supported by public involvement, have the ability to lift a place from a collection of buildings and spaces to a true community.



Older downtowns, by their very natures, are walkable. They evolved during a period when high population density and pedestrians were commonplace. Downtowns can continue to provide an environment where walking can be an enjoyable and practical means of getting around. Great streetscapes become an integral part of the community and provide the means for a significant pedestrian presence, which is necessary for a successful retail environment. Downtown should maintain a pedestrian-oriented focus that is conducive to walking between destinations, stores, and restaurants. Pedestrian-oriented environments include sidewalks, buffers, street trees, benches, fountains, wayfinding signage, lighting, and buildings that are visually interesting and well maintained.

Downtowns should have mixed land uses and extensive pedestrian amenities. Downtowns should have people of all ages moving throughout the district and unique identifiable areas such as outdoor seating, water features, and public art. Elements that create great streetscapes that are comfortable and safe and still provide a high quality pedestrian environment include:

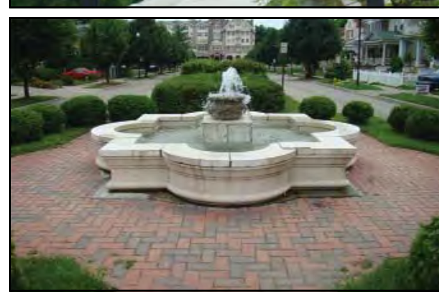
- Sidewalks that are continuous and wide enough to include pedestrian-friendly streetscape elements.
- Short crosswalk distances that provide safe walking environments.
- Symbols that are related to downtown's heritage and brand.
- Seamless streetscapes and gathering plazas with lighting, banners, planters, street trees, benches, public art, and other site furnishings.
- Seasonal lighting that helps to create a festive and inviting environment.
- Borders that offer variety and stimulate interest in adjacent areas through the use of flower beds, sidewalk cafes, benches, and street trees.
- High quality amenities such as public art and other public amenities such as restrooms.
- Safety for pedestrians with lighting, crosswalks, accessible ramps, bike racks, and landscape buffers.
- User friendly and appealing streetscape features and appropriate directional signage.

- Transit friendly and convenient integration of cyclists, public transportation, trolleys and automobiles.
- Bicycle friendly areas with bicycle racks that coordinate with other site furnishings, directional and regulatory signage that identifies bike routes, wayfinding signage, and dedicated bicycle lanes.
- Continuous on-street parking and enforced vehicular speed regulations.
- Streetscape element maintenance as a top priority.

PARKING

There are special issues associated with parking in downtown areas where large numbers of people converge to work, shop, and visit. The lack of parking is frequently cited as a reason for declining vitality of downtown businesses. Parking is intended to serve user needs; and in that regard it should be visible, convenient, and accessible.

Providing continuous on-street parking is a key component in supporting businesses in downtowns, especially central business districts. On-street parking is an efficient means for allowing multiple users to reach several destinations. On-street parking provides a variety of benefits that include calming and slowing traffic while providing a buffer for pedestrian activity. Adequate parking must be available to support area businesses. Parking lots are key elements in meeting user needs and should not only provide parking spaces, but be aesthetically pleasing and safe for pedestrians. Planting buffers at the edges of parking lots can help screen the parking and provide some shade. Landscaped islands should be included throughout the lot, improving not only aesthetics but minimizing storm water run -off. A clear and well lit pathway should be provided for pedestrians as well as identifying signage.



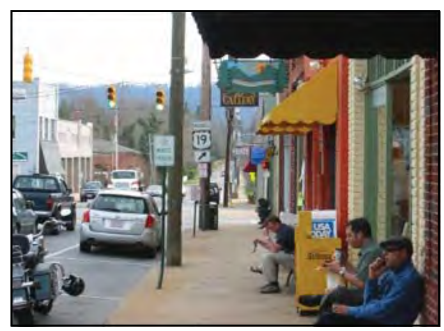
Establishing parking zones is an effective way to ensure there is plentiful customer parking and this can be accomplished with signage that designates parking for customers.

Employees and employers should not park in front of the retail establishments in Downtown. Rather, where possible, they should park in the rear of their establishments or at parking lots designated for employee parking.

Public Spaces and Plazas

Public spaces and plazas are another important component to successful downtown destinations. Many public areas suffer from lack of funding, maintenance, and planning. Public space revitalization, similar to properly maintained facades and streetscapes, have a direct impact on a downtown's economic, environmental, social, and cultural image. Public spaces and plazas offer a fundamental amenity to complement businesses and residents and provide a gathering area, meeting place, or a place for citizens and visitors to relax. Public spaces and plazas should:

- Be easily accessible and visible from the street.
- Preserve and maintain trees and landscaping that provide shade, color, and natural edges.
- Be a flexible, pedestrian-friendly, area that can serve multiple purposes and accommodate activity space for special events.
- Incorporate adjustable seating that complements traditional park benches.

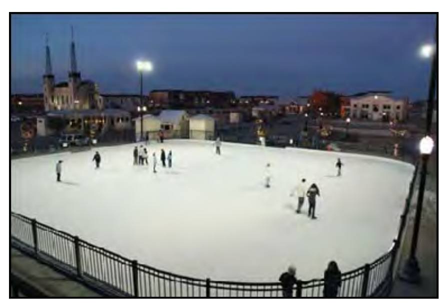


- Be a top priority where the City enforces cleanliness and maintenance standards.
- Contain regulatory park signage and be policed by appropriate City staff.
- Always be safe.

Downtown Environment & Appearance

Downtown's 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 is critical for Downtown revitalization and retail enhancement.

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 between the CCR, Chamber of Commerce, City of Maryville staff, and other private business and property owners. To date, the CCR has successfully raised funds and the City and County have obtained grants for much of the Downtown improvements. But new public sector mechanisms such as a Community Improvement District (CID) or Tax Increment Financing (TIF) District will likely be required to continue with Downtown plans 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 Maryville's priorities:



- Façade restoration and rehabilitation. The CCR and the City must work to encourage rehabilitation of Downtown buildings according to some design guidelines. The existing historic buildings, particularly on Main Street and the Courthouse Square, must be rehabilitated and brought back into productive use. Assistance with façade improvements, through the MDFB Revolving Loan Fund and other funding sources, should recognize the need for work to the side and rear of buildings, some of which have attractive façades. One advantage of building rehabilitation incentives is that they can be granted with conditions, providing an opportunity to ensure improvements are implemented on the entire building and lot.
- Review business signage regulations. The City should conduct this review and identify methods to tighten sign regulations in Downtown. Existing business signage is excessive and causes visual clutter, making all signage less effective.
- Encourage redevelopment and new construction that adds retail space. Redevelopment opportunities, may arise in coming years as vacant spaces are filled and demand for additional retail and restaurant space

grows. As a matter of zoning policy, retail or restaurant uses should be the priority for ground-floor uses in all new buildings. Further, new buildings should generally respect the traditional scale and appearance of Downtown buildings.

- Support code enforcement and plan review efforts. The City's code enforcement efforts should be continued and strengthened to ensure that Downtown buildings and sites are properly maintained.

Business Retention, Expansion & Recruitment

To address retail goals involving existing businesses and attracting new businesses, a formal business retention, expansion and recruitment program is among the most cost -effective initiatives that a community can implement. Programs designed to assist businesses with expansion, relocation, and building improvements can stimulate increased levels of private investment. Efforts should be made to familiarize businesses with local, regional, and state regulations and guidelines as well as business assistance and technical resources.

The CCR should focus on the retention of existing businesses and seek to maintain goods and services that are currently provided. A proactive campaign will include visits and follow-up calls to address retailers' issues. Support from the Chamber can help with information required for relocations and expansions. Additionally, the CCR and Chamber can begin relevant, low-cost, workshops designed to give existing retailers the customer service skills necessary to be competitive and satisfy the needs of their retail markets. These workshops are also an opportunity to encourage businesses to enhance the quality of their stores and broaden the variety of their products and services.

The CCR and the City also have the opportunity to impact the quality of Downtown Maryville's businesses by developing programs such as a Bar Watch. The many nightlife entertainment options in Downtown Maryville are

oriented primarily to NWMSU students. This atmosphere can be positive an encourage more residents and visitors, but it can also be too rowdy. By entering into Good Neighbor Agreements with the bar owners and developing a system for the monitoring of the bar patrons, and perhaps a shuttle to take students home, Downtown can be more inviting to all visitors. The Good Neighbor Agreements will identify City regulations and offer options if a bar owner or manager has unruly patrons. The CCR could provide volunteers on a limited basis to assist with the Bar Watch and the Maryville Police Department should be involved as well.

With existing businesses strengthened, Downtown will also need to attract additional retailers to create a vibrant retail destination. The City Department of Economic Development should work to ensure retail and restaurant locations are given top priority for existing vacant spaces. Other targeted retail establishments, as identified in Table 17 on page 29, should be sought for attraction to Downtown.

The retail attraction campaign should also take into consideration the needs of the residents, NWMSU students, and visitors. In addition to identifying new retail uses the CCR should monitor and track all commercial vacancies within Downtown Maryville. Tools that should be available to the recruitment team include:

- A listing of available buildings that includes exterior photos, rental rates, dimensions, building amenities, and contact information. Listings should suggest the type of businesses for which the available space is best suited.
- A listing of target businesses to contact. The targets should be limited to retail, restaurants, or unique services that will create pedestrian activity and complement existing businesses.
- A listing of local bankers, real estate agents, and appropriate City or regional development staff.

- Brief descriptions of any available local incentives, such as the Nodaway County Economic Development Revolving Loan Fund, that a potential business can access for tenant improvements or rent subsidies.

- Profiles of successful projects implemented by public/private partnerships and testimonials from successful businesses in Downtown Maryville.

The CCR should seek to disseminate the above information and may even fill vacant storefront windows with "Retail Opportunity" displays.

By working with local organizations to connect prospective and existing business owners with existing incentives such as the MDFB Revolving Loan Fund or existing Business Assistance Program, the CCR will be improving the competitive advantage of Downtown Maryville as a whole. Smaller Downtown businesses will be better positioned to compete with larger retail stores. Some simple strategies to compete with big box stores include:

- Look for voids in the mass merchandisers inventory.
- Adjust merchandise to sell unique or higher-end items that can't be found elsewhere.
- Attract dissatisfied customers from the larger retailers.
- Extend store hours.
- Sell singles instead of multi-pack merchandise.
- Focus advertising on competitive advantages.
- Work smarter by using technology and eliminating wasteful overhead.
- Consider providing shopping amenities like gift wrapping, free shipping, convenient return and exchange policies, and recommendations to other Downtown shops and restaurants.
- Focus on providing outstanding personal service and expert technical advice.

This campaign will help direct the MDFB, City of Maryville and Chamber of Commerce in guiding Downtown Maryville with the assistance necessary to create a retail destination.

Retail Location & Mix

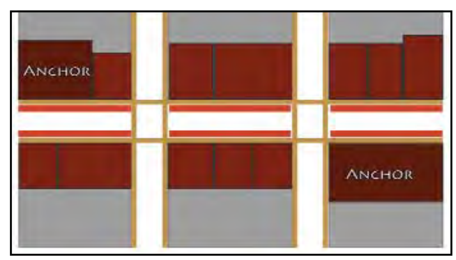
Location and the appropriate mix of retail is a key to retail success. A well developed mix of uses throughout Downtown will generate foot traffic and a solid 24-hour population.

Too often the main retail strip in downtowns include uses that are mostly service oriented. These service oriented businesses take up valuable sales-generating retail space. Downtown should focus its efforts on creating a continuous retail loop with ground floor space largely dedicated to retail establishments. Pedestrian friendly loops of this type should be approximately one-quarter of a mile in length or a five minute walk. Major activity centers or anchors should be no further apart than 300' - 500' if at all possible. This is a distance that pedestrians feel comfortable walking.

An anchor business is typically a larger, well-know store that draws many customers, but it can also be a single establishment, collection of establishments, or an institution. Retail loops should have an anchor located at the beginning and end of the street, if possible. Developing an anchor in Downtown Maryville can serve as a year-round draw, bringing in large numbers of visitors.

Improvement of Upper Floor Space

A strong residential presence is a key component to a prosperous downtown. Downtown residents enjoy close proximity to entertainment venues, restaurants, and shopping. These residents have the ability to expand the retail market by creating additional demand for products and services. Downtown residents also ensure that an area has activity, even when businesses are closed for the day. There is some potential to increase residential development through apartments, condos, or lofts on upper floors throughout Downtown Maryville, although much of this space is already occupied. The City and CCR should focus on enhancing the quality of these units and adding more where possible.



Branding and Marketing

With close proximity to St. Joseph and Kansas City, Missouri, it is critical that Downtown stakeholders develop a brand that differentiates the City and makes a compelling case to visit Maryville. Downtown will be the keystone of this branding effort and the marketing campaign to follow. An important consideration in developing this brand is to remember that Downtown Maryville cannot be all things to all people. The CCR, with the support of the Chamber and City, should begin hosting meetings to focus on the strengths of Downtown and develop a message that crystallizes those ideas. Once branding has been chosen, Downtown businesses should be collectively advertised under this brand. Just as a large shopping center collectively promotes and markets its stores, Downtown needs to work cooperatively for this effort as well. Additionally, other marketing tools will support the brand such as slogans and logos. Future public improvements can also reinforce the ideas of the brand. As the City completes the DREAM Marketing Plan task, ideas for a Downtown brand may be suggested.

The promotion of Downtown Maryville attractions, businesses, and events is a major dimension of Downtown development. The CCR should spearhead the effort to promote the area as a whole. Staging Downtown events, festivals, parades, concerts and other special events, will bring more people Downtown and expose them to what Downtown has to offer. It is important that existing shoppers and visitors are aware of existing stores, restaurants, and new businesses located in Downtown. Overall marketing should be increased for Downtown and its retailers. Promotional activities should target residents, NWMSU students, the STA, and the region. Making the public aware of the wide range of activities is the first step in marketing Downtown.

A business directory of Downtown establishments should be distributed to residents, students, and visitors, and be available in existing retail establishments and new stores. All marketing brochures should be available at Downtown establishments, visitor information centers, the NWMSU campus, and nearby hotels. Local store and restaurant owners and employees should refer their customers to visit other shops Downtown. This can also be accomplished by distributing the business directory at check-out lines and waiting areas.

Shared advertising, such as newspaper ads promoting multiple businesses, is beneficial for Downtown businesses for several reasons. This collective advertising, whether print or electronic media, helps build an image of Downtown as a place with multiple shopping opportunities and reinforces the chosen brand. It can also make advertising more affordable and allow smaller businesses to use advertising media they might not otherwise be able to afford. Downtown cross-promotion efforts could be expanded to include businesses located elsewhere in Maryville, especially those businesses that draw visitors from a wider geographic area.

The long-term success of Downtown redevelopment efforts will depend in part on the quality of marketing and promotional activities as well as the ability of the Downtown leadership to appeal to specific customer segments. Creating a mix of businesses that provide for a variety of experiences allows Downtown to become marketable to residents and visitors of many incomes and lifestyles.

EVENTS

The CCR should develop some standard events held in Downtown Maryville that support the chosen brand. These events should be appealing to NWMSU students, but also to other visitors and residents. Event scheduling is critical, as events held during the summer months will have fewer students in attendance. Therefore, summer events should be held more for Maryville residents and visitors. Some summer events might include:

- A Farmer's Market
- Evening Shopping Nights
- Sidewalk Sales

Similar to the issues with a business becoming a college hangout, an event should strike a balance between student and non-student attendance. Students provide a vibrant atmosphere, but the event may be inundated and develop a reputation that is unfriendly to families and other visitors. The typical shopping events such as sidewalk sales and shopping nights, may not attract NWMSU students. Music and food can typically be added to any events to increase its draw, but adding alcohol to an event must be carefully considered. Events can also include a campus shuttle to encourage student attendance. Some events that may appeal to students, as well as residents and visitors, include:

- A Downtown Business Expo
- A Chili / BBQ Cook off or some other themed food tasting festival
- Art Shows
- Film Festivals

Many of these events can have a student element in the organization or presentation of the event. Interested clubs from NWMSU can help with volunteers and perhaps share in the proceeds.

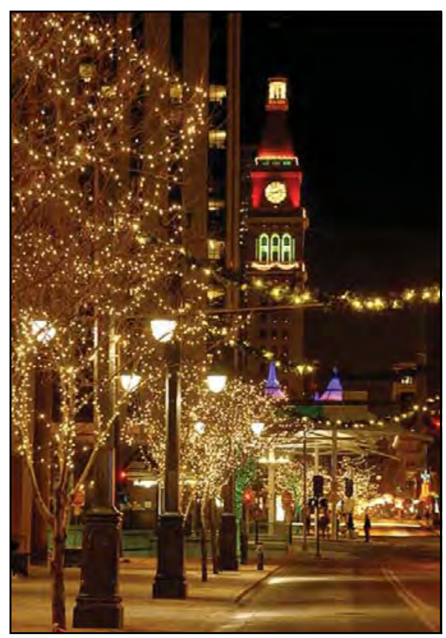
During these events Downtown Maryville retailers should coordinate their hours and develop promotions to get people into their stores. These are perfect opportunities to raise the awareness of their individual store, although it is important to understand that event goers may not purchase items the day of the event. Events create a festive and exciting atmosphere focused around Downtown and are often a source of pride for residents.

Attracting Customers

For the individual Downtown business, attracting customers is also an integral component of retail success. Downtown has established a pool of existing customers, and many of those are students, but needs to continue to reach out to new customers. Businesses should make special efforts to use existing customers as a source of referrals. Creating a base of repeat customers is vital to any retailers success. Creating special promotions targeting Downtown employees, students, and residents is an easy way to reward repeat customers while bringing them back Downtown for longer visits on evenings and weekends.

While some visitors stop and shop in Downtown Maryville, not all visitors do. Additionally, many NWMSU students indicated that they do not visit Downtown with much regularity, although it is close to the campus. Increasing the capture rate of visitors is integral to the success of Downtown. As noted, this will be accomplished with marketing and events, but providing additional wayfinding, signage, and a sense of activity is critical.

Providing standardized "you are here" maps at kiosks and establishments will help visitors navigate their way around Downtown. Proximity signs for large activity centers located near parking lots will assist many pedestrians. Downtown business guides and retailer/restaurant profiles should be made available on-line, at welcome centers, hotels, and other shops and restaurants.



To develop pedestrian activity, businesses must consider extending business hours. Small merchants can find it very difficult to stay open into evening hours, but having a critical mass of stores open for business can transform a Downtown into an active shopping area. Seventy percent (70%) of all sales tend to occur after 5:30 p.m. and on weekends. Adjusting store hours to respond to the change in America's lifestyle will help boost sales and create a new shopping experience. Increasing the number of causal and fine dining options will provide retailers a broader customer market, usually in the evening hours. Many communities have adopted a weekly or monthly event oriented around evening shopping by identifying one coordinated evening a week during which retailers and restaurants stay open late and offer specials (e.g. Thursdays till 8:00 PM or Fridays till 9:00 PM).

RETAIL PRESENTATION & OPERATIONS

The appearance of retail operations is essential to the success of the business. That appearance begins at the sidewalk and continues to the storefront, entrances, and windows. Downtown merchants must appear interesting and inviting to the pedestrian on the sidewalk.

Planters flanking the doorway or window boxes add color and life to the street. Pedestrians may be stopped by a plant, bench or signage, attracting them to the window display. Grabbing the attention of the customer is the first step in bringing them into the shop. Keep the appearance of the sidewalk and storefront neat and clean. The store should also be clearly identified with signage.

The overall appearance of the building is critical. The storefront entrance should be recessed from the sidewalk for emphasis to provide a bit of shelter and remove the open door from the path of pedestrians on the sidewalk. The entrance should be maintained in compliance with the American's with Disabilities Act Accessibility Guidelines. The door should provide a view into the building as well as a sense of openness. The upper, side, and rear façades also provide opportunities for second entrances, signage, display windows, or outdoor café seating and should be as inviting and appealing as the main entry.

After evaluating the curb appeal and storefront of each business, window displays must be considered. Shoppers learn everything about a store at the window as they act as a store's billboard that announces the brand and character of the products within. A positive tone should be set by the windows. Great window displays will help lure customers into the store. If a pedestrian stops in front of a store window, they are one step closer to entering the shop.

Corner storefronts are significant, they help keep pedestrians moving and may motivate pedestrians to cross the street. When these windows are vacant they discourage pedestrians from crossing to the next corner. The CCR should encourage

property owners of vacant buildings to allow the group to place rotating displays from other stores, information on upcoming festivals, or local artwork in corner buildings.

Display Windows

Window displays must grab the attention of the pedestrian. The elements of the building are more likely to catch the eye of the motorist, while the window is the connection between the stores goods and the pedestrian. Effective window displays are developed using:

- Themes: Window displays should establish a theme and integrate props. They can follow the general items in the store or a specific set of items. Themes such as sports, children's stories, romance, nature, patriotism, or storytelling should be considered.
- Simple Repetitive Objects: Repeating objects creates a strong message. They do not need to be expensive to be successful. Simple objects such as cut out hearts, gloves. Lampshades, balloons or handwritten notes can create dynamic and rhythmic displays.
- Found Objects: These objects can be window frames or wine barrels that reinforce the window statement.
- Flexible Backdrops: They can be textured or fabric panels reflecting the products displayed, highlighting the season or the richness of the interior that is found beyond the windows.
- Window Graphics: Graphic statements can define a function or add interest to the merchandise.
- Night Lighting: Once window displays have been created they should be lighted. When lighted they add life to the evening streetscape and act as a 24 hour billboard. People leaving nearby businesses with later uses, such as restaurants, theaters and drinking establishments will be compelled to return.
- Varied Window Displays: Displays should be rotated every four to six weeks.

Signage and Branding

Just as Downtown Maryville should be branded as a whole, individual business owners must decide on their brand that defines their store and their perception in customers' minds. These decisions will determine the direction for store logos, signage, and interior design. Colors and font type used should reflect the brand and merchandise. Brand logos should be used consistently on merchandise, hang tags, business cards, and printed advertisements. Shopping bags are walking advertisements that reinforce the store's style and should always include the shop logo.

It is important that the store brand is well matched to customers and other store aspects. A fancy, frilly logo for a store selling outdoor sporting goods sends conflicting signals to the consumer. Similarly, if the market segment a store is trying to reach is upper scale, plain brown paper bags in which to send products home is probably not a good match.

Interiors

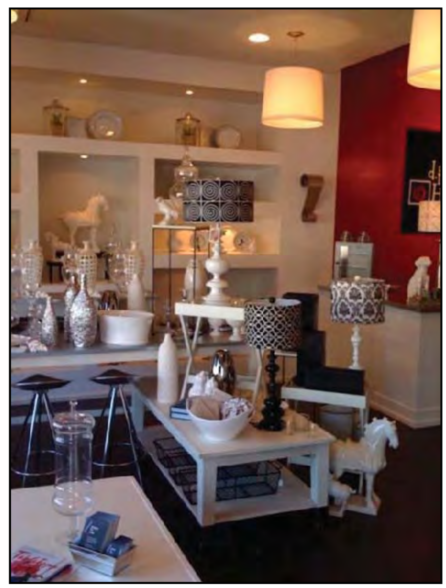
Retail establishments should have flexible features so the store can reinvent itself when necessary. Successful interior layouts have several common denominators, including:

- Feature Displays: Once a customer has entered the interior of the shop, there should be an open area to adjust to their surroundings and make decisions.
- First Fixture: The first fixture should be well inside the entrance and is often a feature display which tells a story about a specific theme or product. These displays can be seasonal or a specialty product line.
- Music: Music should be played that matches the store image and brand. This simple step will bring an empty store to life and puts customers at ease.
- Secondary Displays: These displays encourage the customer to keep moving through the store. This is accomplished by the placement of a variety of minor

merchandise groups throughout the store. The height and shape of these displays should vary and interrupt long runs of repeating products on walls.

- Floor Space: The area from the floor to about 18" up is not "shop-able" and is best used for storage.
- Visible Back Wall: Making the back wall visible and interesting from the front of the store, will draw customers through the length of the store. This can be as easy as using paint or unusual fixtures. Place sale or clearance merchandise in the back to make customers walk past other items to get there.
- Grouping Merchandise: Techniques for grouping the merchandise can help shoppers make decisions faster and potentially buy more merchandise.
    - By Color: Group all red items together, blue items together, etc. This method is often used for seasonal displays.
    - By Product Combination: These items provide irresistible opportunities for customers to purchase combined products with a similar theme. Group clothing with coordinating accessories or staff favorites.
    - Fabrication Type: All glass should be kept with the glass, wood with wood, pewter with pewter, and pottery with pottery.
- Impulse Items: These are inexpensive items, often located by the cash register, and are generally offered as add-on sales.

Customers need the opportunity to learn about merchandise, special products, and obtain samples in a comfortable space. A pleasant greeting and an intuitive store layout with well lit displays will encourage customers to browse. Counters and back rooms that are visible to the customer should be clean and clutter free, as they are an indication of the stores internal operations.



A Downtown map and business directory should be located at each register to encourage shoppers to visit neighboring stores and help visitors navigate Downtown. The store should be viewed from the customers viewpoint and these following concepts should be kept in mind.

- Signage should reflect the brand.
- Entrance and windows must be appealing.
- Merchandise must be useful or unique.
- Focal points and product placement must be able to keep their interest.

IMPLEMENTATION

- **ENERGIZING THE BUSINESSES ON THE COURTHOUSE SQUARE AND MAIN STREET.**

  The support of businesses on the courthouse square and Main Street is critical. The CCR will focus the business workshops, the bar watch program, and business retention, expansion, and attraction efforts tightly upon these areas and private sector investment should be encouraged and incentivized. Existing retailers in these areas also form the core of the collective advertising program. Additionally, the buildings in this area contain the potential to create more ground floor retail space if office and service uses can be encouraged to relocate. These buildings are the heart of Downtown Maryville and the prime retail locations.

  The CCR will require formalization and a full-time Executive Director, once the City has identified a revenue mechanism such as a CID. The responsibilities outlined in the recommendations in this report are great, but with the help of the City and support from the Chamber of Commerce, the CCR can be the champion that Downtown's businesses need to grow and thrive.

- **DEVELOP SIGNATURE DOWNTOWN EVENTS.**

  The event potential of Downtown Maryville is great. With support from the students, the right events can become widely known. The CCR should choose and focus on building two or three events into major draws for Downtown. Festivals in the spring, summer, and fall would provide a mix of students, residents, and visitors. Local businesses should provide sponsorships to launch the events, particularly in the case of a business expo. Events such as a cook off, themed tasting event, or art show could have some fees from the entrants, but will likely require initial underwriting and sponsorships. A film festival, student art show, or outdoor concert should be economical to launch. Any new event will require extensive promotion and likely need more than one year to determine success.

- **STRENGTHEN EXISTING BUSINESSES.**

  As Downtown Maryville revitalizes, it is imperative that existing businesses are supported and encouraged. The CCR can undertake numerous activities including business events and promotions, seminars, and retail reviews. A sample store checklist for such a review program is found in Appendix F.

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Appendix

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Legend

Study Area

D·R·E·A·M

Appendix A-1
Downtown Trade Area
Downtown Maryville
Downtown Study Area
City of Maryville , Missouri

PGAVPLANNERS

Appendix A-2
Primary Trade Area

Retail Market Analysis
City of Maryville, Missouri

Legend

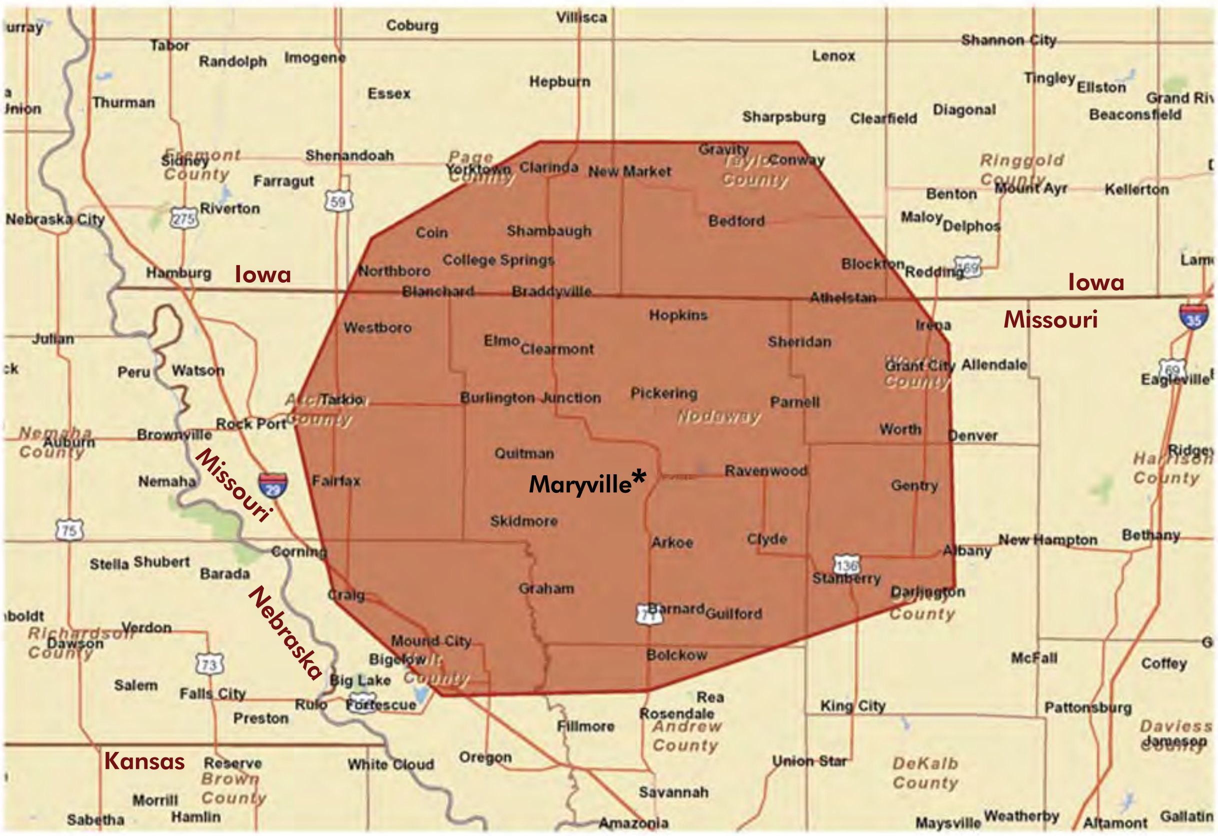
- Primary Trade Area
- DREAM Study Area

D·R·E·A·M

PGAVPLANNERS

Appendix A-3
Secondary Trade Area

Retail Market Analysis
City of Maryville, Missouri



Legend

Secondary Trade Area

D·R·E·A·M

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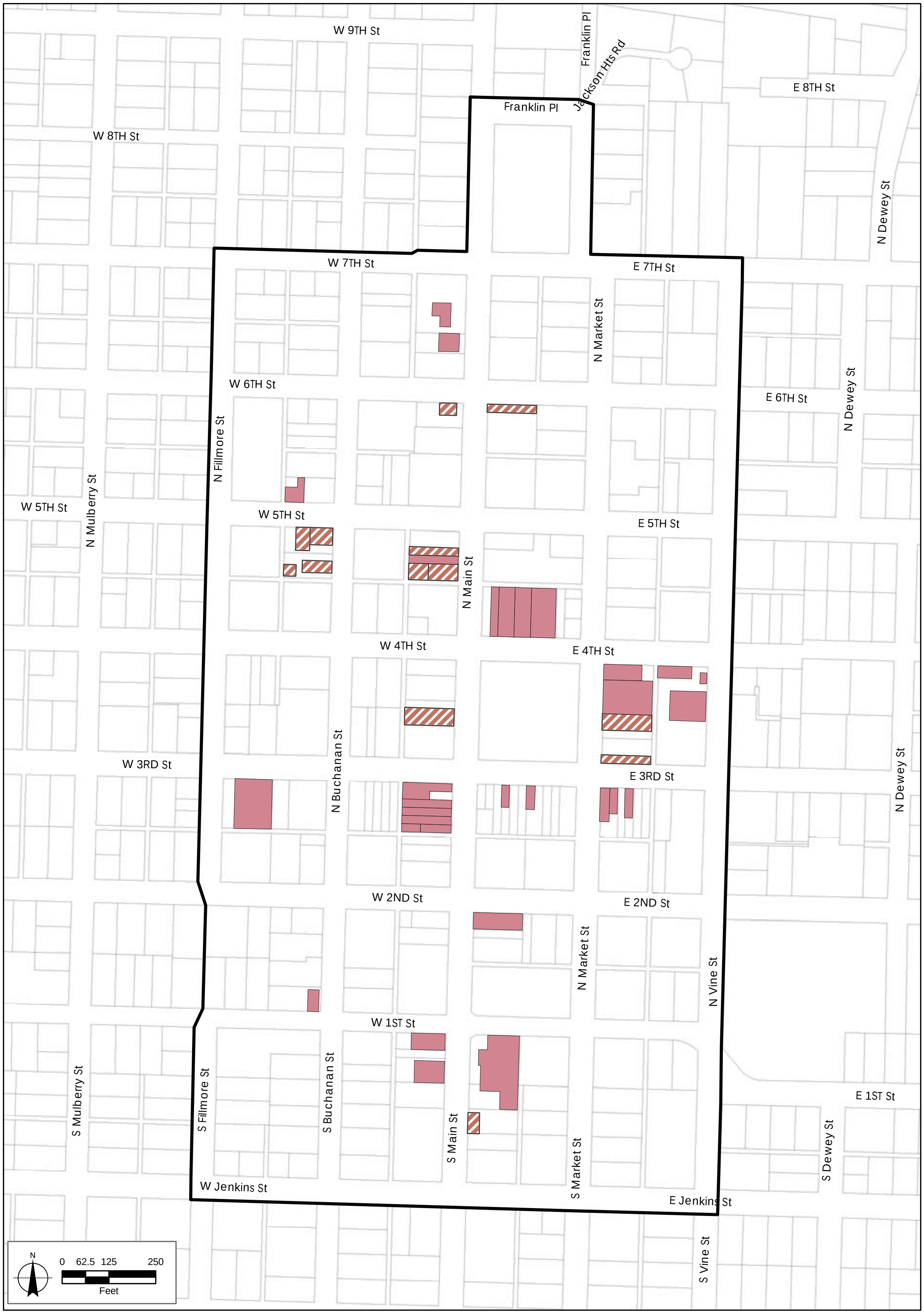
Appendix B

Downtown Maryville DREAM Study Area
Retail Demand & Sales

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 [2]	Downtown Businesses [2]	Downtown Trade Area Capture	Downtown Pull-factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722) [1]	$194,401,347	287	$141,684,088	$ 52,717,259	326,164	4,012	$79,026,077	109	$77,383,264	$13,611,843	29	3,393	3.99
Total Retail Trade (NAICS 44-45)	$150,981,686	196	$115,481,653	$ 35,500,033	194,642	3,116	$59,908,385	75	$60,613,410	$8,994,178	19	2,887	3.40
Total Food & Drink (NAICS 722)	$43,419,661	91	$26,202,435	$ 17,217,226	131,521	896	$19,117,692	34	$16,769,854	$4,617,665	10	5,153	6.06
Furniture & Home Furnishings Stores (NAICS 442)	$6,097,110	8	$1,451,061	$ 4,646,049	25,474	126	$2,296,447	5	$912,432	$134,941	1	1,072	1.26
Furniture Stores (NAICS 4421)	$4,144,018	1	$90,350	$ 4,053,668	22,226	86	$1,202,673	0	$0	$0	0	0	0.00
Home Furnishings Stores (NAICS 4422)	$1,953,092	7	$1,360,711	$ 592,381	3,248	40	$1,093,774	5	$912,432	$134,941	1	3,348	3.94
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$7,642,451	16	$4,871,123	$ 2,771,328	15,195	158	$3,994,181	10	$4,295,368	$157,285	1	997	1.17
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$12,652,931	40	$23,111,073	$ (10,458,142)	(57,341)	261	$4,600,770	17	$19,137,708	$290,729	2	1,113	1.31
Building Material and Supplies Dealers (NAICS 4441)	$10,739,523	27	$4,828,192	$ 5,911,331	32,411	222	$4,146,276	11	$2,115,002	$290,729	2	1,312	1.54
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,913,408	13	$18,282,881	$ (16,369,473)	(89,752)	39	$454,494	6	$17,022,706	$0	0	0	0.00
Food & Beverage Stores (NAICS 445)	$58,957,728	30	$38,896,223	$ 20,061,505	109,995	1,217	$22,852,698	4	$13,454,569	$6,621,241	1	5,442	6.40
Grocery Stores (NAICS 4451)	$57,757,194	23	$38,124,136	$ 19,633,058	107,646	1,192	$22,616,539	3	$13,396,386	$6,621,241	1	5,555	6.54
Specialty Food Stores (NAICS 4452)	$190,451	4	$186,278	$ 4,173	23	4	$0	1	$58,183	$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	$1,010,083	3	$585,809	$ 424,274	2,326	21	$236,159	0	$0	$0	0	0	0.00
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$8,579,156	15	$4,665,630	$ 3,913,526	21,457	177	$2,848,705	5	$1,074,980	$317,709	2	1,794	2.11
Clothing and Clothing Accessories Stores (NAICS 448)	$5,660,442	11	$1,707,020	$ 3,953,422	21,676	117	$2,304,781	7	$1,074,084	$70,696	1	605	0.71
Clothing Stores (NAICS 4481)	$4,024,844	8	$1,360,774	$ 2,664,070	14,607	83	$1,337,044	4	$727,838	$70,696	1	851	1.00
Shoe Stores (NAICS 4482)	$770,023	2	$188,658	$ 581,365	3,188	16	$454,825	2	$188,658	$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$865,575	1	$157,588	$ 707,987	3,882	18	$512,912	1	$157,588	$0	0	0	0.00
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$2,988,925	20	$2,425,608	$ 563,317	3,089	62	$1,464,599	11	$1,857,966	$142,689	3	2,313	2.72
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$1,509,523	17	$957,311	$ 552,212	3,028	31	$581,029	8	$389,669	$80,729	2	2,591	3.05
Book, Periodical, and Music Stores (NAICS 4512)	$1,479,402	3	$1,468,297	$ 11,105	61	31	$883,570	3	$1,468,297	$61,960	1	2,029	2.39
General Merchandise Stores (NAICS 452)	$43,825,867	13	$36,373,179	$ 7,452,688	40,862	904	$18,160,789	4	$17,979,957	$7,603,052	2	8,406	9.89
Department Stores Excluding Leased Depts. (NAICS 4521)	$37,255,969	4	$17,092,707	$ 20,163,262	110,553	769	$18,160,789	2	$13,462,862	$6,590,076	1	8,571	10.08
Other General Merchandise Stores (NAICS 4529)	$6,569,898	9	$19,280,472	$ (12,710,574)	(69,691)	136	$0	2	$4,517,095	$1,012,976	1	7,471	8.79
Miscellaneous Store Retailers (NAICS 453)	$4,577,076	43	$1,980,736	$ 2,596,340	14,235	94	$1,385,415	12	$826,346	$277,077	6	2,933	3.45
Florists (NAICS 4531)	$683,954	11	$446,515	$ 237,439	1,302	14	$111,093	3	$180,353	$99,890	2	7,077	8.33
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$1,904,386	9	$621,810	$ 1,282,576	7,032	39	$692,483	3	$351,210	$64,182	1	1,633	1.92
Used Merchandise Stores (NAICS 4533)	$887,713	15	$387,354	$ 500,359	2,743	18	$170,368	4	$101,376	$39,442	2	2,153	2.53
Other Miscellaneous Store Retailers (NAICS 4539)	$1,101,023	8	$525,057	$ 575,966	3,158	23	$411,471	2	$193,407	$73,563	1	3,238	3.81
Food Services & Drinking Places (NAICS 722)	$43,419,661	91	$26,202,435	$ 17,217,226	131,521	896	$19,117,692	34	$16,769,854	$4,617,665	10	5,153	6.06
Full-Service Restaurants (NAICS 7221)	$23,827,927	50	$12,224,733	$ 11,603,194	88,636	492	$10,121,674	17	$7,648,922	$1,801,341	4	3,663	4.31
Limited-Service Eating Places (NAICS 7222)	$11,842,636	21	$10,253,172	$ 1,589,464	12,142	244	$3,919,512	10	$7,126,060	$2,460,935	4	10,069	11.85
Special Food Services (NAICS 7223)	$6,244,381	4	$1,548,513	$ 4,695,868	35,871	129	$4,820,710	3	$1,456,164	$0	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	$1,504,717	16	$2,176,017	$ (671,300)	(5,128)	31	$255,796	4	$538,708	$355,389	2	11,444	13.46

[1] Totals in these categories do not include Auto Sales, Gas Sales, or Non Store Retailers

[2] ESRI states that a grocery store exists in Downtown, however Maryville currently does not have a grocery store located in Dowtnown. Therefore the grocery retail sales were subtracted from the Total Retail Trade



Legend

Retail

Restaurant & Bar

Study Area

Appendix C
Retail Locations

Downtown Study Area
City of Maryville , Missouri

D·R·E·A·M INITIATIVE

PGAVPLANNERS

Legend

1st Floor Vacany

Study Area

Appendix D
1st Floor Vacancy

Downtown Study Area
City of Maryville , Missouri

D·R·E·A·M INITIATIVE

PGAVPLANNERS

Legend

- 1-5 Parking Spaces
- 6-10 Parking Spaces
- 11-20 Parking Spaces
- 21-30 Parking Spaces
- 31-40 Parking Spaces
- 41-50 Parking Spaces
- 51-60 Parking Spaces
- 71-80 Parking Spaces
- Study Area

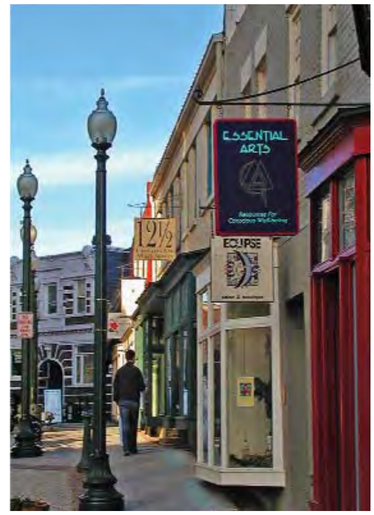
Appendix E
Parking Inventory
Downtown Study Area
City of Maryville , Missouri

PGAVPLANNERS

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 and logo?

☐ **Yes**

☐ **No**

Description

- Is the storefront generally clean?

☐ **Yes**

☐ **No**

Description

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

☐ **Yes**

☐ **No**

Description

DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
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 (for the Pedestrian)?

  ☐ **Yes**

  ☐ **No**

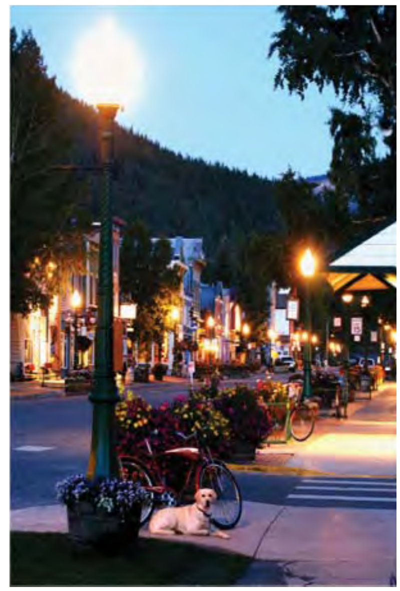
  Description

- Does signage occur at car level (for the Driver)?

  ☐ **Yes**

  ☐ **No**

  Description



Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

☐ Yes

☐ No

Description

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____

- Is the signage maintained in good condition?

☐ Yes

☐ No

Description

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- Does the signage complement the building and area?

☐ Yes

☐ No

Description

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- Are the exterior signs lighted (at night)?

☐ Yes

☐ No

Description

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D·R·E·A·M
INITIATIVE

Existing Store Checklist

Display Windows:

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

Description

- Are window displays rotated every 4-6 weeks?

☐ **Yes**
☐ **No**

- Do the displays effectively represent the store brand?

☐ **Yes**
☐ **No**

- Do displays include the best or most popular products?

☐ **Yes**
☐ **No**

Display Description

- If it is 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

Existing Store Checklist

Interior

Flooring:

- Is the floor worn, hazardous, or slippery?

☐ **Yes**
☐ **No**

- Is the floor clean?

☐ **Yes**
☐ **No**

- Is there a 5-10' area without store fixtures at the entry ?

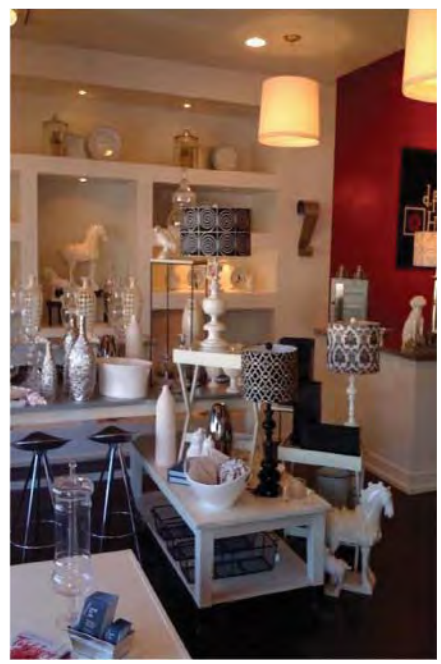
☐ **Yes**
☐ **No**

- Is there a walk-off area to clean shoes?

☐ **Yes**
☐ **No**

Flooring Description

____
____
____
____



Ceiling:

- Is the finish in good condition (stained/missing tiles/peeling paint)?

☐ **Yes**
☐ **No**

Description

____
____
____
____

- Are the HVAC vents clean?

☐ **Yes**
☐ **No**

Existing Store Checklist

Ceiling:

- Are there any distracting issues?

☐ Yes

☐ No

Description

____

____

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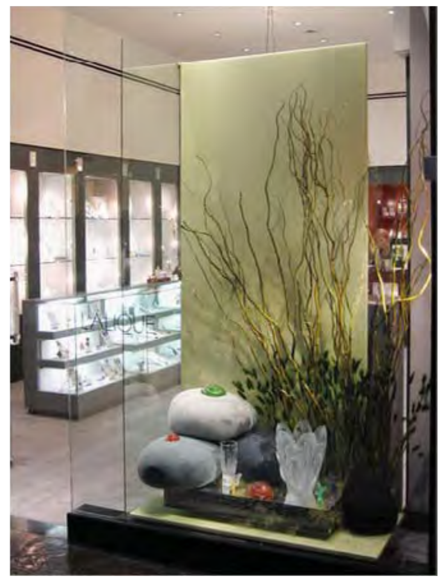

Lighting:

- Is the lighting adequate to show the merchandise?

☐ Yes

☐ No

- Is the bulb type appropriate (fluorescent/incandescent)?

☐ Yes

☐ No

- Are the bulbs the same type?

☐ Yes

☐ No

- Does the lighting design match the rest of the interior style?

☐ Yes

☐ No

Lighting Description

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- Are there adjustable lights to create focal points?

☐ Yes

☐ No

Description

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Existing Store Checklist

Interior Colors:

- Are the interior finishes (painting/wall coverings/paneling, etc.) in good condition?

☐ **Yes**

☐ **No**

Description

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- Are the paint and finish colors consistent with the store brand and logo?

☐ **Yes**

☐ **No**

Description

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- Are the paint colors consistent from fixture to fixture?

☐ **Yes**

☐ **No**

Description

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Circulation:

- Does the foot traffic flow smoothly?

☐ **Yes**

☐ **No**

Description

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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 customers?

  ☐ **Yes**

  ☐ **No**

- Are there slow pockets of merchandise that receive little attention?

  ☐ **Yes**

  ☐ **No**

  Customer Flow Description

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Cash Wrap/Register:

- Is the cash wrap area in good condition?

  ☐ **Yes**

  ☐ **No**

- If there is 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 of purchasing?

  ☐ **Yes**

  ☐ **No**

- Is the counter top clutter-free?

  ☐ **Yes**

  ☐ **No**

- Is the location appropriate? (It should not occupy prime real estate)

  ☐ **Yes**

  ☐ **No**

Existing Store Checklist

Cash Wrap/Register:

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

  Description

Fixtures & Equipment:

- Does the fixture style match the store 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

Existing Store Checklist

Merchandising:

- Are displays grouped by color, material or product brand?

☐ **Yes**

☐ **No**

- Does the product inventory match the internet site?

☐ **Yes**

☐ **No**

Description

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- Is there a feature fixture near the entry that tells the story of the store brand and product style?

☐ **Yes**

☐ **No**

Description

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Cleanliness:

- Is the store clean and free of dust?

☐ **Yes**

☐ **No**

Description

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- Are boxes cleared and out of sight?

☐ **Yes**

☐ **No**

- Are the views into off-limit areas blocked?

☐ **Yes**

☐ **No**

D·R·E·A·M

Existing Store Checklist

Cleanliness:

- Are product signs and price-tags professional, consistent in type, and not hand-made?

☐ Yes

☐ No

Description

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Comfort:

- Is the shop a comfortable temperature?

☐ Yes

☐ No

- Are entry doors easy to open and close?

☐ Yes

☐ No

- Are 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

Existing Store Checklist

Dressing Rooms:

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

Staff:

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

Description

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

Description

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

Description

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Other Comments:

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APPENDIX G

Table References

Table 16: Disposable Income
ESRI

Table 17: Future Retail Growth
ESRI

Table 18: 1st Floor Vacancy
PGAV PLANNERS - Land Use & Building & Infrastructure Survey

Table 19: Potential New Retail
PGAV PLANNERS

Table 20: Potential Retail Space Allocation
PGAV PLANNERS

Appendix H

Detailed Market Data—Table of Contents

The following tables are provided in electronic format.