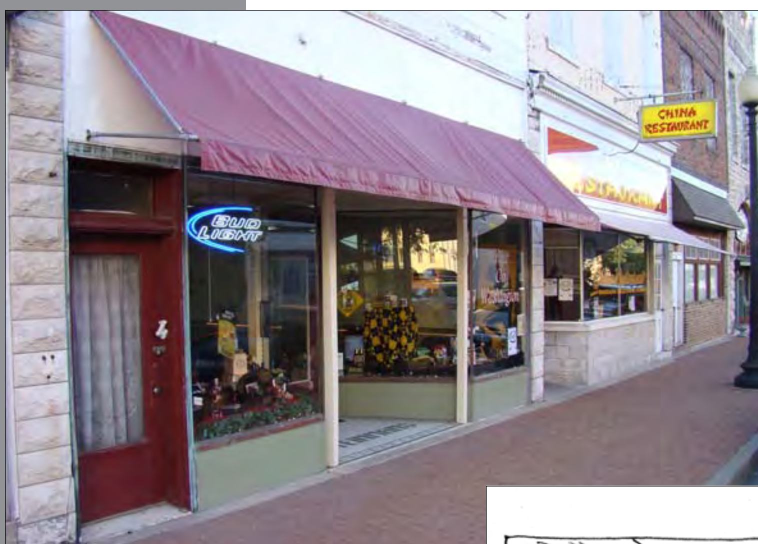
Mexico, Missouri

DOWNTOWN REVITALIZATION & ECONOMIC ASSISTANCE FOR MISSOURI

RETAIL MARKET ANALYSIS



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DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
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Acknowledgements

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EXECUTIVE SUMMARY

The retail market in Downtown Mexico is sound, however is there is opportunity for real and sustainable growth. The Retail Market Analysis had determined that with the proper additions to the consumer goods and hospitality choices, the retail market for Downtown could see a significant 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 the Downtown and city limits. As of the publication of this report, the local, state and national economy is recovering from a recession and the retail market is overbuilt in certain aspects, however Downtown Mexico has many assets to utilize to grow and sustain the retail market: existing businesses which have been in Downtown for decades, good access from a state highway, many cultural institutions located in Downtown and recent investments in the public infrastructure. These assets along with the opportunities identified in this report, illustrate the potential for an enhanced retail market and more vibrant Downtown Mexico.

The Retail Market Analysis was conducted by analyzing data for three areas: The Downtown Trade Area (DTA) which is the DREAM study area; Primary Trade Area (PTA) which is the city limits; and the Secondary Trade Area (STA) which is a 30 minute drive time from Downtown Mexico, primarily along the Highway 54 and Interstate 70 corridors. The existing retail market, demographics, and surveys were also documented and analyzed to help define a strategy to strengthen the retail market in Downtown Mexico.

The DTA consists of 36 acres with 253,258 square feet of existing 1st Floor Commercial/Retail Space. Approximately 73,124 square feet of 1st floor space is currently used as Retail/Restaurant Space and another 44,591 square feet is vacant. The 73,124 square feet of Retail/Restaurant Space is generating about $11.2 million in sales annually (sales do not include automobiles, gasoline stations or non-store retailers) or about $175 per square foot for retail sales. Restaurant sales total $61 per square foot. The 44,591 square feet of vacancy represents potentially another $7.8 million in additional sales (annually) for Downtown Mexico.

A potential opportunity is to target retail stores which can make use of the existing vacant properties in Downtown Mexico. The vacant floor space, if utilized, could have a substantial and positive impact on the retail market for Downtown.

While stores in Mexico draw customers from outside of the Primary Trade Area, some retail goods and services are not available locally, not even within the Secondary Trade Area. This demand and lack of supply locally is prompting shoppers to leave the STA to meet their retail needs beyond the Mexico area. Such retail demand presents an opportunity for Downtown Mexico to capture more retail dollars.

The Retail Market Analysis has concluded that there is unmet demand (the difference between retail demand and actual sales) in the Secondary Trade Area. Based on the unmet demand in the STA and the average sales per square foot in Downtown of $175 per square foot, the Retail Market Analysis estimates that Downtown Mexico could support an additional 190,743 square feet of retail business. Existing Downtown retail stores could capture this unmet demand by expanding floor area and new products or Downtown could attract new retail businesses.

The table below, Table 17: Future Retail Growth, lists the retail areas for potential growth in Downtown Mexico. The retail goods and services are classified according to the North American Industrial Classification System (NAICS) in industry groups.

TABLE 17: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[2]
Building Material & Supply Stores	$ 2,207,989	12,653
Grocery Store	$ 10,397,916	59,585
Clothing Stores	$ 224,488	1,286
Shoe Stores	$ 350,201	2,007
Book, Periodical, and Music Stores	$ 124,927	716
Florists	$ 111,036	636
General Merchandise Stores	$ 5,197,731	29,786
Full-Service Restaurants[3]	$ 2,884,525	47,659
Special Food Services	$ 2,105,361	34,785
Drinking & Entertainment	$ 98,602	1,629
TOTAL	**$ 23,702,776**	**190,743**

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

[2] Based on $175 in sales per square foot in Downtown Mexico based on existing retail inventory and activity.

[3] Based on $61 per square foot in Restaurants Sales

The highest unmet retail demand, which Downtown Mexico could capitalize on is in the following three categories:

- Grocery Stores: $10.4 million in unmet demand
- General Merchandise Stores: $5.2 million in unmet demand
- Full Service Restaurants: $2.8 million in unmet demand

The unmet demand for retail goods and services, listed above, could generate over $18 million in additional sales for Downtown Mexico. The potential to satisfy these demands would provide multiple benefits to Downtown beyond sales dollars:

- Full Service Restaurants: New restaurants or expanded existing restaurants could fill much of the vacant floor space in Downtown. Greater options for casual and fine dining would also meet the requests documented in the community surveys conducted early in the DREAM Initiative.
- Building Material and Supply Stores: Current vacant floor space of large and smaller buildings Downtown could help meet the demand for additional building material and supply selections and potentially bring in $2.2 million in sales.
- Special Food Services: Downtown Mexico's role as a cultural center can be enhanced with the addition of special food services such as a high end catering business and/or banquet hall. This sector has the opportunity to generate an additional $2.1 million in sales.
- Although grocery stores represent the largest unmet demand in the Mexico area market, with the current location of a large grocery just outside the Downtown boundaries and limited availability of suitable large floor area space, the emphasis therefore should be more on General Merchandise, Full Service Restaurants, Building Material, and Special Food Services, as well as other retail.

In summary, the Retail Market Analysis has illustrated that opportunity exists to increase the retail market in Downtown Mexico. Although many challenges exist which may hinder retail development, many opportunities are also present which can foster new growth and vibrancy into the retail marketplace of Downtown Mexico. Many of the existing stores in Downtown have been in business for many years, offering high quality service and merchandise. These businesses have proven that Downtown Mexico can support retail stores, attracting local and regional customers. Civic leadership should work with local businesses, lending institutions and developers to take advantage of Downtown's many assets including available first floor space, good access, central location, and the community's role as a cultural center. An aggressive marketing plan will help sell Downtown Mexico as an unique shopping destination of quality goods and services at high end retail shops.

INTRODUCTION

A significant component of a successful and vital downtown is a unique shopping experience. One way to achieve overall downtown revitalization is to encourage the restoration of Downtown's function as a destination shopping hub of the region. Mexico should strive to provide this experience through creation of a diverse retail mix and enhancement of Downtown as a destination. The DREAM Initiative, in recognition of the importance of this component, provides this analysis and recommendations as a first step towards creating a successful Downtown retail environment.

In many instances, modern development trends have diminished the function of the typical American downtown in every day life. As neighborhood development sought affordable undeveloped land, cities expanded away from their downtown core. Shopping habits shifted as the automobile increased the mobility of the consumer, and shopping centers with major retailers located along major roadways. Though diminished in function and, perhaps, in stature, Downtown Mexico holds the potential to regain its original position as a center of the community.

Downtown Mexico, the subject area of this report, is fortunate to have maintained its viability as a potential destination. The history of the city and region is connected to the Village Square of Downtown. Centered around the Village Square are numerous professional offices, civic institutions, shops, offices and recreation/ entertainment venues. In summary, Downtown Mexico is still important to the City and the region.

BACKGROUND & METHODOLOGY

The Retail Market Analysis takes a comprehensive approach to quantify the retail demand and supply for the trade areas in order to identify potential retail services inherent to Downtown's success. This report also makes recommendations on appropriate strategies for encouraging sustainable 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 goals.

As a component of other DREAM Initiative activities surveys were conducted of business owners, city staff, residents and visitors which provide key insights into desirable Downtown improvements and retail services. Additionally, a thorough review of future residential demand for the trade area was conducted in the *Residential Demand Analysis*. A physical examination of the trade area and surrounding region provides insight into the traffic and pedestrian patterns, as well as identify the business mix and Downtown occupancy.

The retail demand, or spending power of the trade area, is compared to the retail supply, or the retail sales of the area, in order to quantify potential unmet demand in Downtown Mexico. Retail categories with unmet demand are evaluated against the community survey results and economic and physical conditions of Downtown in order to develop a list of retail stores to target.

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 analysis are valid and likely supported through the year 2015. The analysis is meant to provide general strategic direction for developing retail in Downtown Mexico. This study is not intended to be the sole basis for development decisions.

TRADE AREA PROFILE

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

TRADE AREA DEFINITIONS

Retail market analysis often evaluates three different geographic trade areas: a Downtown Trade Area (DTA/Downtown Mexico), Primary Trade Area (PTA) and a Secondary Trade Area (STA). For the purposes of this study, the PTA is the Mexico City limits. The STA will be any point within a 30-minute drive of Downtown. The 30-minute drive boundary presents an acceptable catch-basin of consumers likely to make a shopping trip to Downtown. The 30-minute drive time also represents a typical commute time for the PTA's labor pool. A map of each area is included in Appendix A and the three areas of analysis are summarized below.

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

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

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

It is important to note that the Trade Areas ignore municipal, county, and state boundaries. Modern consumers will typically shop at a location most convenient for them to travel to, regardless of jurisdiction.

TRADE AREA DEMOGRAPHIC SNAPSHOT

When evaluating the demographics it is helpful to use a baseline to compare other data and for comparison of DREAM communities an accurate baseline is provided using data from the State of Missouri. Using the State of Missouri as a baseline also provides an indication of positive or negative performance.

In order to understand the Trade Areas that are the focus of this study it is important to understand their demographic composition.

The following table highlights the demographics from 2009 for Downtown Mexico (DREAM Study Area), the Primary Trade Area (Mexico city limits), Secondary Trade Area (30 minute drive time), and the State of Missouri.

TABLE 1: 2009 DEMOGRAHIC SNAPSHOT

	Downtown Mexico	Primary Trade Area	Secondary Trade Area	State of Missouri
Population	31	10,811	24,891	5,984,833
Average Household Income	$37,865	$49,792	$50,589	$62,922
Housing Units	21	5,349	11,630	2,703,311
Owner Occupied	9	3,091	7,373	1,665,239
Renter Occupied	9	1,514	2,768	702,860
Vacant Units	3	744	1,489	332,507
Median Age	35.0	41.5	40.3	37.7
19 and Under	8	2,757	6,601	1,606,622
20-44	12	3,114	7,328	1,967,041
45 and Over	11	4,940	10,962	2,411,170

MARKET PROFILE/DEMOGRAPHIC TRENDS

DOWNTOWN MEXICO

Downtown (defined as the area within Mexico's DREAM boundary) is situated roughly on 36 acres and consists of approximately 133 buildings on 16 city blocks (see Figure 1). Before presenting data on the City as whole, listing information on Downtown Mexico is important to understand.

Figure 1: Downtown Mexico

Currently, 31 people live Downtown in 21 housing units averaging 1.72 persons per unit. The average household income is $37,865. The median age is 35. Approximately 26% of the population are 19 or younger; 36% of the population are between 20 and 44 years of age; and 38% of the population are 45 years of age or more.

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

TABLE 2: DOWNTOWN MEXICO

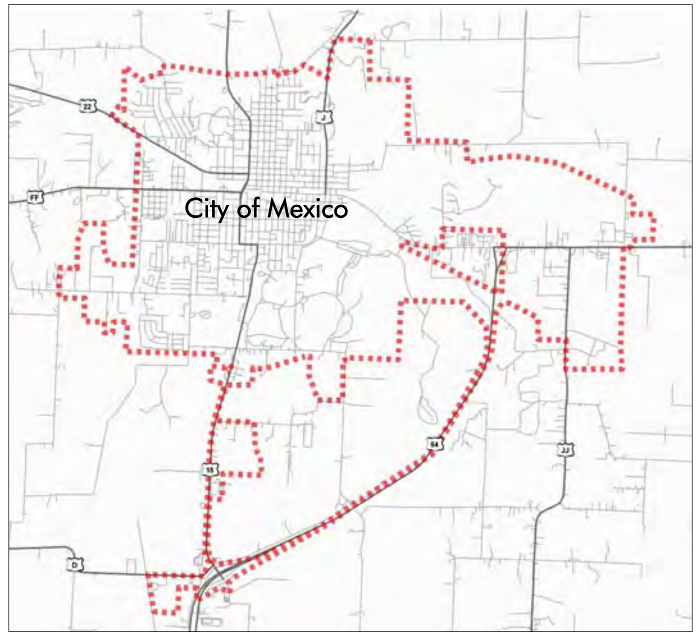
	2000	2009	2014	% Change '00-'09	% Change '09-'14
Population	32	31	30	-3.1%	-3.2%
Average Household Income	$27,583	$37,865	$37,635	37.3%	-0.6%
Housing Units	21	21	21	0.0%	0.0%
Owner Occupied	10	9	10	-10.0%	11.1%
Renter Occupied	9	9	8	0.0%	-11.1%
Vacant Units	2	3	3	50.0%	0.0%
Median Age	33.8	35.0	35.0	3.6%	0.0%
19 and Under	9	8	8	-11.1%	0.0%
20-44	12	12	11	0.0%	-8.3%
45 and Over	11	11	11	0.0%	0.0%

PRIMARY TRADE AREA

Currently, 10,811 people live in the Primary Trade Area (defined as the city limits of Mexico) in 5,349 housing units; (refer to Figure 2) with the 2.9 persons per unit. The average household income is $49,792. The median age is 41.5. Approximately 26% of the population are 19 or younger; 29% of the population are between 20 and 44 years of age; 45% of the population are 45 years of age or more.

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

Figure 2: Primary Trade Area



Legend
- - - - City Limits

TABLE 3: PRIMARY TRADE AREA

	2000	2009	2014	% Change '00-'09	% Change '09-'14
Population	11,320	10,811	10,586	-4.5%	-2.1%
Average Household Income	$40,954	$49,792	$50,986	21.6%	2.4%
Housing Units	5,301	5,349	5,349	0.9%	0.0%
Owner Occupied	3,186	3,091	3,021	-3.0%	-2.3%
Renter Occupied	1,617	1,514	1,515	-6.4%	0.1%
Vacant Units	498	744	813	49.4%	9.3%
Median Age	39.8	41.5	42	4.3%	2.2%
19 and Under	2,966	2,757	2,593	-7.0%	-5.9%
20-44	3,453	3,114	3,028	-9.8%	-2.8%
45 and Over	4,901	4,940	4,965	0.8%	0.5%

SECONDARY TRADE AREA

Currently, 24,891 people live in the Secondary Trade Area in 11,630 housing units (refer to Figure 3). The average household income is $50,589. The median age is 40.3. Approximately 27% of the population are 19 or younger; 29% of the population are between 20 and 44 years of age; 44% of the population are 45 years of age or more.

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

Figure 3: Secondary Trade Area

TABLE 4: SECONDARY TRADE AREA

	2000	2009	2014	% Change '00-'09	% Change '09-'14
Population	25,292	24,891	24,738	-1.6%	-0.6%
Average Household Income	$42,960	$50,589	$51,622	17.8%	2.0%
Housing Units	11,287	11,630	11,726	3.0%	0.8%
Owner Occupied	7,449	7,373	7,328	-1.0%	-0.6%
Renter Occupied	2,743	2,768	2,803	0.9%	1.3%
Vacant Units	1,095	1,489	1,595	36.0%	7.1%
Median Age	38.1	40.3	41.0	5.8%	1.7%
19 and Under	7,208	6,601	6,432	-8.4%	-2.6%
20-44	8,043	7,328	7,124	-8.9%	-2.8%
45 and Over	10,041	10,962	11,182	9.2%	2.0%

STATE OF MISSOURI

As of 2009, 5.9 million people live in the State of Missouri in 2.7 million housing units. The average household income is $62,992. The median age is 37.7. Approximately 27% of the population are 19 or younger; 33% of the population are between 20 and 44 years of age; 40% of the population are 45 years of age or more. The table below gives a detailed demographic trend for the State of Missouri.

TABLE 5: STATE OF MISSOURI

	2000	2009	2014	% Change '00-'09	% Change '09-'14
Population	5,595,211	5,984,833	6,179,066	7.0%	3.2%
Average Household Income	$49,956	$62,922	$65,335	26.0%	3.8%
Housing Units	2,442,017	2,703,311	2,806,568	10.7%	3.8%
Owner Occupied	1,543,354	1,665,239	1,720,426	7.9%	3.3%
Renter Occupied	652,018	702,860	735,320	7.8%	4.6%
Vacant Units	246,643	332,507	350,821	34.8%	5.5%
Median Age	36.1	37.7	38.1	4.4%	1.1%
19 and Under	1,594,535	1,606,622	1,629,367	0.8%	1.4%
20-44	1,997,196	1,967,041	2,000,946	-1.5%	1.7%
45 and Over	2,008,380	2,411,170	2,548,753	20.1%	5.7%

DEMOGRAPHIC COMPARISON

The demographics show no growth (and potential population loss for the Trade Areas) for population and housing units within all three Trade Areas; however the average household income is predicted to increase slightly in the Primary and Secondary Trade Areas. The growth in incomes indicates that all areas are improving their viability. While growth rates in certain demographics are slower than the State they are not significantly lower to indicate any foreseeable growth barriers.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Average HHI % Change		Median Age % Change	
	00-'09	09-'14	00-'09	09-'14	00-'09	09-'14
Downtown	-3.1%	-3.2%	37.3%	-0.6%	-11.1%	0.0%
PTA	-4.5%	-2.1%	21.6%	2.4%	-7.0%	-5.9%
STA	-1.6%	-0.6%	17.8%	2.0%	-8.4%	-2.6%
State	7.0%	3.2%	26.0%	3.8%	0.8%	1.4%

Population growth rates for the Trade Areas vary in relation to the State of Missouri.

The Trade Areas are expected to have zero growth in the number of new housing units. The Primary and Secondary Trade Areas are expected to see a decrease in the median age of its residents while Downtown Mexico is expected to see no change. The Median Age of Downtown is lower than all other Trade Areas and the State. It is projected to stay that way through the five-year projections. This is an interesting trend that is unique to rural communities, suggesting that Mexico may be retaining more of its youth than the norm.

The Average Household Income (HHI) trends for the Mexico Trade Areas lag the growth rates projected for the state, but still indicate growth (except within Downtown Mexico). It is important to note that the Average Household Income for the Downtown is significantly lower than the State. Part of the reason for this is the relative cost of living being lower in the Mexico Trade Areas than the average for the State.

TABLE 7: DEMOGRAPHIC AGE COMPARISON

	19 & Under % Change		20-44 % Change		45 & Over % Change	
	00-'09	09-'14	00-'09	09-'14	00-'09	09-'14
Downtown	0.0%	-8.3%	0.0%	0.0%	0.0%	0.0%
PTA	-9.8%	-2.8%	0.8%	0.5%	0.8%	0.5%
STA	-8.9%	-2.8%	9.2%	2.0%	9.2%	2.0%
State	-1.5%	1.7%	20.1%	5.7%	20.1%	5.7%

The Downtown, Primary Trade Area (City) and the Secondary Trade area are not projected to see significant growth in housing units in the next five years. It is projected that the number of rentals will decrease while the number of owner occupied housing will increase in Downtown Mexico.

TABLE 8: DEMOGRAPHIC HOUSING UNITS COMPARISON

	Housing Units % Change		Owner Occupied % Change		Renter Occupied % Change	
	00-'09	09-'14	00-'09	09-'14	00-'09	09-'14
Downtown	0.0%	0.0%	-10.0%	11.1%	0.0%	-11.1%
PTA	0.9%	0.0%	-3.0%	-2.3%	-6.4%	0.1%
STA	3.0%	0.8%	-1.0%	-0.6%	0.9%	1.3%
State	10.7%	3.8%	7.9%	3.3%	7.8%	4.6%

The positive growth rates will be significant to the retail development in Mexico.

HOUSING MARKET ANALYSIS SUMMARY

An important component of any vibrant downtown area are residents who add to the customer base supporting retail and service businesses. They give the 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 Spring 2009 that projected residential demand for the area, with a focus on Downtown Mexico. The Residential Demand Analysis concluded that Downtown Mexico can support an additional 71 market rate, affordable and senior rental housing units.

Downtown Mexico presents an interesting housing market, where the existing stock of residential units within the DREAM Study Area suffer from poor maintenance. The housing units immediately surrounding the Study Area are mixed in terms of condition and level of maintenance. Many residential units around the Study Area have been converted to commercial and office space, are in good condition and well maintained. The existing residential space in Downtown consists of single-family houses, market rate and affordable and senior rental units (which have good occupancy) and a few upper floor residential apartments in commercial buildings.

The market rate for existing rental units is between $325 and $400 (for a one to three bedroom rental unit). The price range for owner-occupied housing is between $30,000 and $150,000.

The Residential Demand Analysis report concluded that Downtown could support an additional 71 housing units. Increasing residential space has several benefits: utilizing vacant upper-floor space and underutilized land, increasing consumer traffic and density, increasing tax base, and creating ideal conditions for extended business hours and additional businesses.

Downtown Mexico could support a range of housing types including 23 market rate rentals, 16 affordable family rentals and 32 additional senior rentals. The senior demographic is underserved in Downtown and providing additional housing options is a way to attract additional residents. The second largest market comprising 36% for the population are individuals between 20 and 44. There will be demand for this demographic group with loft style condos and family rentals.

The City of Mexico should utilize its existing resources and promote the conversion of upper floors of existing commercial buildings into residential uses where appropriate. There are currently 8 buildings with vacant upper-floor space. These vacancies totals 25,000 square feet. While some of this space should be reserved for office and service uses, approximately 75% of the vacant space, (18,750 square feet) could be used for residential conversions. Converting this vacant square footage would create approximately 23 apartments with an average of 800 square feet. Converting the upper-floor space would accommodate 30% of the supportable demand. Downtown Mexico also has several vacant tracts of land that could satisfy the new residential and retail space. Mixed-use developments should be considered when developing vacant land.

Meeting future housing demand can take many different forms depending upon the desires of the community and development site opportunities. These sites could accommodate single-family residences, however mixed–use buildings would allow for not only residential growth, but commercial and retail growth as well. The target markets for these units include young professionals, empty-nester senior citizens, and small households.

In addition to new residential development Downtown Mexico should preserve and improve its existing residential neighborhoods. Strengthening the existing residential market in and around Downtown will provide immediate results by tapping into the existing consumer base.

Mexico is in the midst of a Downtown resurgence. Efforts should continue to develop new residential space and convert appropriate existing buildings in the Downtown to residential uses. Primary Trade Area residents will play an important role in the Downtown revitalization effort, therefore it is critical to have a plan establishing Downtown as a destination for unique shopping, entertainment, dining and living.

CONSUMER SEGMENTS

Downtown Mexico should identify specific strategies to meet the needs of specific consumers. It is helpful to identify what consumer segments patronize Downtown to gain a better understanding of their needs. There are four broad categories of consumers Downtown Mexico serves:

Downtown Employees

- Downtown is home to over 513 employees and 63 businesses,
- This equates to a potentially large spending:
  - 513 x $15 weekly = nearly $400,140 a year spent by Downtown employees.
- 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 31 residents Downtown.
- 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.

Local Residents

- Larger segment than Downtown residents with population of 10,811 citywide, or in the PTA.
- Local residents visit Downtown for a variety of reasons including conducting business, shopping and dining.
- 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 Downtown.
- This segment is a lucrative merchandising opportunity, especially for impulse spending, due to frequent number of visits to Downtown.
- Effective strategies for this segment are to inspire community loyalty through effective marketing and create Downtown as an option for all shopping needs.

Tourists - Visitors

- Looks for unique experience and products.
- Has need for increased entertainment options for visitors as well as a need for convenience items that travelers require.

COMMUNITY SURVEYS

In order to gather information about perceptions and desires for Downtown Mexico the DREAM Initiative conducted Focus Groups, Telephone and Visitor Surveys. These surveys provided a wealth of information for the various planning tasks. The survey results offer an important source of data about local consumer behavior. The surveys measure the community's desire for additional retail, restaurant and entertainment offerings in Downtown Mexico. Survey findings relevant to retail development are summarized below.

Focus groups were conducted to gather initial information about Downtown Mexico relative to four groups: City Council & Administration, Downtown Business Owners, New Residents, and Long-Time Residents. Important results relative to retail development are:

- Downtown Mexico is generally visited for the County Courthouse and professional services located in Downtown.
- Downtown does not have enough variety of restaurants, retail or special events and regular entertainment. Downtown businesses also have inconvenient business hours during the week and weekends and no navigational signage making Downtown not user friendly.
- Downtown Mexico is in need of a general "spruce up,' to improve the aesthetics of buildings (rear of buildings), parking lots, sidewalks and general infrastructure.
- Participants stated parking was a perceived problem as Downtown has ample parking Downtown but employees use parking spaces in front of businesses, making customer parking difficult.
- Participants felt that adding additional retail is Downtown's top priority, and new businesses should include: Causal and fine dining, apparel (men's, women's, children's and shoes), bar, bookstore, coffee shop, organic grocery, bakery, sporting goods and other specialty stores.

Upon completion of the Focus Groups the DREAM Initiative conducted a Community Phone Survey to verify perceptions of Downtown and determine community desires for Downtown. Important results relative to retail development are listed as follows:

- Residents most often visit Downtown for "government/post office" (73%) and to "conduct business" (54%). Only 24% stated their main reason for visiting Downtown is to shop.
- Almost 41% of residents visit Downtown more than 5 times a month and another 43% visits one to five times a month.

- Downtown draws residents in all age and income groups. Of those who stated shopping as the main reason for a visit are 18-34, have lived in Mexico for 2 years or less and have an income of $25,000 or less.
- Of those who stated dining as the main reason for a visit are 18-34, have lived in Mexico for 3-5 years or less and have an income of $75,000 to $99,000.
- Most respondents felt there was a lack of dining and shopping options.
- 50% or more of respondents from all age groups stated that family or causal style dining as a very high priority. Fine dining is a top priority for income groups of $75,000 to $99,000 and $100,000 plus. Respondents also felt that outdoor dining would be a welcome addition to Downtown.
- Clothing stores are a high priority for the age group 18-34, newer residents and lower income groups. Those with an income of $75,000 to $99,000 also place a high priority on clothing stores.
- Attractions aimed at teenagers was supported by all age groups as a top priority, especially those in age groups 18-34 and 35-49.
- Individuals with an income of $100,000 or more and respondents who have lived in Mexico the longest placed the highest priority on dining, both casual and fine.
- Highest priority for additional businesses in Downtown included: family/ casual dining, fine dining, attractions aimed at teenagers, and clothing stores. Other retail establishments included: shoe store, bookstore, bakery, sporting goods and specialty food store.

It is important to consider this information when determining what retail mix will be the most successful in Downtown. A simple strategy for success is to capitalize on the residents who already use Downtown the most, usually to shop or conduct business. This group desires "casual dining" and "clothing stores."

Important findings from the Visitor Survey concluded why out of town visitors visit Downtown Mexico. These findings include:

- Most visitors come for special events followed by shopping and conducting business. A large majority of visitors have been to Downtown before, but are not regular visitors.
- Once visitors are Downtown they are most likely to attend special events, dine and shop. Other activities are largely centered around government and business.
- Mexico does not have a large percentage of overnight visitors, and 37% of those spend less than $50. An additional 29% spend between $50 to $100.

- More than half of visitors bring children with them.
- Visitors find Downtown Mexico easy to use, navigate and find parking.
- Visitors stated that a restaurant, clothing store, antiques shop, bakery, sporting goods store and a bookstore would be welcome additions and add to the visitor experience.
- They also stated the need for family style restaurants, and attractions aimed at children and more family events.

CONCLUSIONS FROM SURVEY DATA

It is important to consider the implications of the survey data when determining what retail development strategies will be most successful for Downtown Mexico. A good strategy to start with is to capitalize on the existing consumer and retail business base, while simultaneously attempting to attract additional consumers and new retail businesses. For this strategy to be effective there must be a comprehensive analysis identifying implications from the preceding information.

Some implications include:

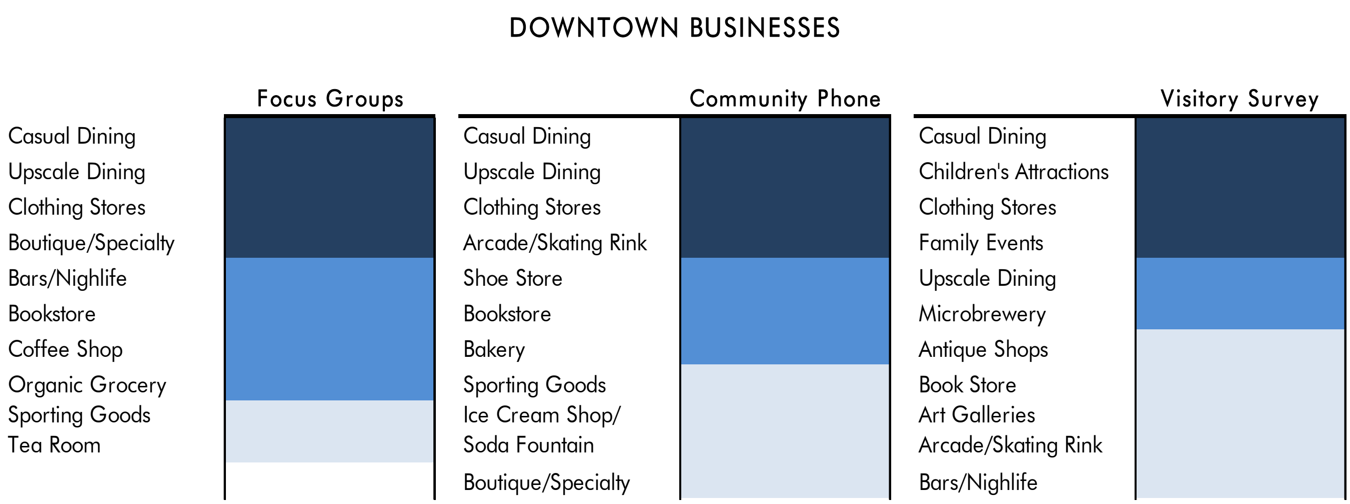
- Store hours are inconvenient and need to be adjusted to better fit peak shopping hours and visitors.
- Downtown parking was perceived as a problem by Focus Groups participants, however, when tested through the Community Telephone Survey parking was found to be easy to locate and plentiful.
- A large number of respondents visit Downtown for special events, shopping and dining however all respondents indicated they would like more entertainment options.
- Long-term residents visit Downtown less often than newer residents, indicating that long-term residents may have a more negative perception of Downtown, and newer residents may be more open-minded about utilizing Downtown.
- Households with lower-income levels shop Downtown more often than higher-income households, therefore an appropriate mix of retail would include retaining stores for existing shoppers while attempting to attract new higher-end stores and higher-income households.
- All focus groups and different demographic categories would like to see a movie theater, more restaurants Downtown.

Results of the surveys indicated a strong preference for the following businesses in Downtown:

- Movie Theater
- Family & Casual Dining – Ice Cream Stores, Soda Fountains, Coffee Shops, Bakery, Restaurants and Outdoor Dining Cafes
- Clothing Stores – Men, Women's and Children's Clothing, Shoes and Accessories
- Art Galleries & other Art Related Stores
- Entertainment Options & Nightlife
- Attractions aimed at Teenagers
- Sporting Goods Store
- Bookstore
- Lodging Options

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

Figure 4: Downtown Priorities



Business Market

The City of Mexico and 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 Mexico's growth strategy. Table 9 illustrates the total employment in 2009 for the Trade Areas.

TABLE 9: 2009 TOTAL EMPLOYMENT

	Downtown	PTA	STA
Employees	513	6,247	10,240
Businesses	63	636	1,149

Downtown saw a decrease of 26% in the number of employees since 2008, while the City of Mexico had a 6.5% increase in number of jobs for the same time period. The STA has experienced 10% growth from 2008 to 2009. Only Downtown Mexico experienced a decrease in the number of businesses from 2008 to 2009, while PTA and the STA had an increase in the number of businesses. Mexico recently saw the addition of 74 new jobs when the A.P Green facility was re-commissioned by Mid America Brick & Structural Products. The addition of these jobs is a boost to the Mexico economy.

The employment mix by industry in the City of Mexico closely mirrors that of the STA and the surrounding region. Downtown has the highest concentration of jobs in the retail sector. The percentage of retail jobs in Downtown (28%) is higher than that of the PTA (19%) and the STA (25%). All three trade areas have the highest concentration of jobs in the service sector. Most of Downtown Mexico's jobs are in the service sector (43%). Downtown also has a small number of jobs in Finance, Insurance and Real Estate and other Professional Services. The largest employers in the City include:

TABLE 10: CITY OF MEXICO EMPLOYERS

Company Name	Industry	Employment
Audrain Medical Ctr	General Medical and Surgical Hospitals	550
Home Decorators Collection	Furniture Stores	350
Walmart Supercenter	Department Stores (except Discount Department Stores)	300
Dawn Food Products Inc	Commercial Bakeries	200
V A Mexico Clinic	All Other Outpatient Care Centers	184
Spartan Light Metal Products	Metal Service Centers and Other Metal Merchant Wholesalers	175
Missouri Military Acad Annex	Elementary and Secondary Schools	110
Golden Living Ctr-Pin Oaks	Nursing Care Facilities	99
Teva Pharmaceuticals Usa Inc	Pharmaceutical Preparation Manufacturing	92
Roberts Consolidated Ind Inc	Floor Covering Stores	90
Soft Surroundings	All Other Support Services	89

COMPARATIVE MARKET ANALYSIS

Mexico's Downtown was the major shopping district in the community until the City began to grow and more businesses, including Wal-Mart, began to sprout up in other areas. Although most retail and service businesses are located in other areas of the community, a few small businesses continue to operate Downtown and appear to generate some pedestrian traffic around the square. Some commercial vacancies were noted, but overall the Downtown seems to have good occupancy and appears to be economically vibrant for a small rural community.

Downtown Mexico is served by a couple of gas stations and a shopping area called West Plaza of Mexico. The shopping area contains a grocer, fast food restaurants, auto repair shops and other typical neighborhood businesses.

Downtown Mexico has two automotive dealerships that had approximately $7.9 million in sales in 2009. Downtown Mexico also has a large amount of sales in Other Motor Vehicle and Auto Parts, Accessories and Tire Stores totaling $1.2 million. These sales are not included in the retail gap analysis.

The major retail areas, identified above, all compete with Downtown Mexico for retail consumers. These 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.

TENANT MIX & LAND USE

During the Land Use, Building & Infrastructure Survey (conducted in 2008), 46 retail and restaurant establishments in Downtown Mexico were identified, five of which were fully vacant. The land use survey identified 89 commercial properties and 40 retail properties. Currently, there is approximately 44,591 square feet of vacant 1st floor space available in Downtown to accommodate new retail and restaurant establishments.

TABLE 11: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Commercial	89	61	199,194	18,789	9.4%
Retail	30	24	77,266	13,167	17.0%
Restaurant	10	7	21,660	12,635	58.3%
Single-Family	4	2	3,986	-	-
Multi-Family	1	1	574	-	-
Parking Lots	0	5	0	-	-
Vacant Lots	0	3	0	-	-
Recreation	0	1	0	-	-
Public Institutional	7	7	33,088	-	-

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

MARKET RESEARCH FINDINGS

RETAIL ANALYSIS

A review of the Downtown Trade Area (DTA) provides an idea of the possible new and existing business potential for Downtown Mexico. The DTA consists of 36 acres with 253,258 square feet of existing 1st Floor Commercial/Retail Space. In reviewing the DREAM Land Use and Building Survey results, PGAV has determined that approximately 73,124 square feet of 1st floor space is currently used as Retail/ Restaurant Space and another 44,591 is vacant. The 73,124 square feet of Retail/ Restaurant Space is generating about $11.2 million in sales annually (sales do not include automobiles, gasoline stations or non-store retailers) or about $175 per square foot for retail sales and $61 per square foot for restaurant sales. The 44,591 square feet of vacancy represents potentially another $7.8 million in additional annual sales to the Downtown Trade Area.

Table 12 represents the breakdown of retail establishments in the Mexico Downtown Trade Area, the Primary Trade Area and the Secondary Trade Area. The bulk of retail establishments in Downtown Mexico are categorized as Miscellaneous Retail.

TABLE 12: RETAIL ESTABLISHMENTS

	Downtown Mexico		Primary Trade Area		Secondary Trade Area	
	Retail Businesses	Retail Employees	Retail Businesses	Retail Employees	Retail Businesses	Retail Employees
Retail Trade Summary	27	173	145	1,180	225	2,512
Home Improvement	2	6	6	66	19	87
General Merchandise Stores	2	6	0	329	6	339
Food Stores	1	2	2	60	22	164
Auto Dealers, Gas Stations, Auto Aftermarket	3	24	24	147	54	552
Apparel & Accessory Stores	1	3	1	5	4	9
Furniture & Home Furnishings	4	55	55	33	20	437
Eating & Drinking Places	8	40	20	322	48	665
Miscellaneous Retail	6	37	37	218	52	259
All Businesses	63		636		1,149	
All Employees	513		6,247		10,240	
Total Residential Population	31		10,811		24,891	
Daytime (Employee)/Nighttime (Population) Ratio	16.55		0.58		0.41	

* Table 12 Retail Establishments data is provided by ESRI, MERIC and PGAV Planners, and represents the best information available.

The retail services located in Downtown Mexico are listed in Table 13 (page 24-25) and are organized according to the North American Industrial Classification System ("NAICS"). Using the NAICS system allows the report to compare retail activity by "sectors" or categories, so that the report can then recommend retail uses and establishments to fit any gaps in retail service. The following list classifies existing businesses under the NAICS system (these business were observed during the Land Use, Building & Infrastructure fieldwork) . A map of the Retail Establishments is located in Appendix C.

TABLE 13: EXISTING RETAIL

NAICS Industry Group	Store Name
Furniture & Home Furnishings Stores	R & B Furniture Store
	Picton Furniture
	Erdel & Wood Home Improvement
	Jim Stubblefield Furniture
Electronics & Appliance Stores	Bob's Appliance Center
	RadioShack
	Fleming Electronics
Health & Personal Care Stores	TJ's Hair Affair
	Ron's Barber Shop
	Remedies Salon & Spa
	Hilda's Hair World
	Steve's Styles & Barber
	Merle Norman Cosmetic & Gift Gallery
	Jefferson Beauty Shop
	Kandy's Kreative Kuts
	Lucky 7
	TNT Tanning
Clothing and Clothing Accessories Stores	JC Penny's Catalogue Store
	Weddings by Pilchers
	Cathy's Consignments
Jewelry, Luggage, and Leather Goods Stores	Pilcher Jewerly
	Melody's Quality Jewelry
Sporting Goods & Hobby Stores	Mexico Music
	Mark's Music
	Scrapbook Store and More
	Homestead Hearth
	Mexico Sewing Center
Office Supplies, Stationery, and Gift Stores	K & M Printing Company
	Graphitti/Herbal Emporium
	SOS Shipping
	Charm's Hallmark

TABLE 13: EXISTING RETAIL (continued)

Miscellaneous Store Retailers	Cinema Plus
	US Cellular
Used Merchandise Stores	Coal Street Antiques
	Tiger Pawn
	Santa Fe Trails Resale
Food Services & Drinking Places	Jackson Street Diner
	China Restaurant
	Nick's Bar & Grill
	Dugout Bar & Grill
	Pizza Works
	Coach's Pizza World
	Wine on Washington
	GT Express Shoppe

The spending habits of the consumers in the three study areas are of great concern to this analysis because such habits provide the basis for the determination of demand. In short, determining how much each household spends on average per retail sector provides an idea of the demand for particular retail services within a given trade area. Table 14 provides per household annual consumer expenditures for seven main categories and several sub-categories of retail expenditures.

TABLE 14: CONSUMER EXPENDITURES

Retail Sector	Downtown Mexico	Primary Trade Area	Secondary Trade Area
Average Household Income	$37,865	$49,792	$50,589
Total Households	18	4,607	10,146
Average Annual Household Expenditures for Select Retail Sectors			
Food	$4,472	$5,833	$5,863
Food at Home	$2,619	$3,454	$3,452
Food Away from Home	$1,853	$2,380	$2,411
Apparel and Services	$967	$1,217	$1,234
Household Merchandise			
Electronics	$989	$1,261	$1,273
Household Goods	$590	$811	$822
Household Care	$683	$893	$915
Transportation	$2,179	$2,930	$2,922
Health & Personal Care	$677	$942	$932
Health Care	$454	$658	$644
Personal Care Products	$222	$285	$287
Entertainment & Recreation	$1,769	$2,412	$2,445

The largest portion of expenditures are spent on food (at home and away from home), transportation, entertainment and recreation. The trade areas spend approximately 40% of food expenditures away from the home. The Secondary Trade Area has the largest average household income between the three trade areas, and spends the highest amount of dollars on retail activities.

The following tables depict Mexico's potential purchasing power. Table 15: Household Income, illustrates the number of households at regular income thresholds.

TABLE 15: HOUSEHOLD INCOME

Income Level	Downtown Trade Area	Primary Trade Area	Secondary Trade Area
Total Households	18	4,607	10,146
$ 0 - $14,999	3	742	1,319
$ 15,000 - $24,999	3	573	1,258
$ 25,000 - $34,999	3	688	1,441
$ 35,000 - $49,999	5	885	1,928
$ 50,000 - $74,999	3	940	2,537
$ 75,000 - $99,999	0	364	913
$ 100,000 - $149,999	0	314	568
$ 150,000 - $199,999	0	51	91
$ 200,000 +	0	51	91

Table 16: Disposable Income, clarifies this idea by showing the amount of disposable income, per household, for Downtown Mexico and the STA. This table presents the user with an idea of the volume of demand available within Downtown and the STA.

TABLE 16: DISPOSABLE INCOME

Income Level	Downtown Trade Area	Primary Trade Area	Secondary Trade Area
Less than $15,000	4	841	1,455
$15,000-$24,999	4	780	1,702
$25,000-$34,999	4	839	1,813
$35,000-$49,999	4	879	2,112
$50,000-$74,999	2	810	2,208
$75,000-$99,999	0	238	451
$100,000-$149,999	0	161	306
$150,000-$199,999	0	26	42
$200,000+	0	33	57
Total	18	4,607	10,146
Median Disposable Income	$27,825	$32,569	$35,683
Average Disposable Income	$29,706	$41,741	$42,715

The PTA has the highest percentage (10%) of households with a disposable income of $75,000 or more. Determining the retail sectors that have unmet demand in Downtown will help retain the amount of retail dollars spent inside the Downtown as well as attract additional dollars from the Primary and Secondary Trade Areas. Targeting Downtown Mexico and the Primary and Secondary households will be an important component in reviving the retail market in Downtown.

POTENTIAL STORE SPACE SUPPORTED

While, on the whole, the City draws shoppers from outside the City limits, there are still retail services for which shoppers leave the STA. The fact that some shoppers leave the STA for certain types of retail services indicates demand for goods that cannot be met in any of trade areas. Understanding this unmet demand reveals an opportunity for Downtown Mexico to capture more retail spending and add to the "gravitational pull" of Mexico's retail sector.

In Table 17: Future Retail Growth, the unmet demand (the difference between retail demand and actual sales) is listed for 11 retail categories. Given the total unmet retail demand within the Secondary Trade Area and the average sales in Downtown Mexico of $175 per square foot, PGAV estimates that Downtown Mexico could support an additional 190,743 square feet of retail by capturing the STA's unmet demand in the specified retail sectors.

TABLE 17: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[2]
Building Material & Supply Stores	$ 2,207,989	12,653
Grocery Store	$ 10,397,916	59,585
Clothing Stores	$ 224,488	1,286
Shoe Stores	$ 350,201	2,007
Book, Periodical, and Music Stores	$ 124,927	716
Florists	$ 111,036	636
General Merchandise Stores	$ 5,197,731	29,786
Full-Service Restaurants[3]	$ 2,884,525	47,659
Special Food Services	$ 2,105,361	34,785
Drinking & Entertainment	$ 98,602	1,629
TOTAL	**$ 23,702,776**	**190,743**

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

[2] Based on $175 in sales per square foot in Downtown Mexico based on existing retail inventory and activity.

[3] Based on $61 per square foot in Restaurants Sales

Existing retailers could potentially capture this unmet demand by expanding floor area and adding new products, or new retailers could enter the marketplace. Downtown Mexico has several areas where new retail could be developed (these will be explained in detail in Available Retail Space Inventory on page 30). However Downtown has the potential to fill the existing vacant square footage with new retail. Downtown also has existing retailers that could potentially expand to accommodate the additional demand. Downtown Mexico should focus on creating an anchor retail location, whether a restaurant, furniture store or movie theater. In addition to an anchor, smaller specialty stores have the potential to be successful and support the unmet demand in a number of other retail sectors.

In 2009 Downtown sales totaled $11.2 million in total retail and food and drink. Food and Drink sales only totaled 5% of all retail sales in Downtown. The largest amount of sales for Downtown Mexico is from Furniture and Home Furnishing Stores. Automotive sales are also a large component in Downtown's retail market totaling $9.3 million in 2009 (this report does not include sales from automobiles, gasoline or non-store retailers). Almost 10% of Downtown sales is from Electronic and Appliance Stores. Maintaining this retail base is important for Downtown Mexico, however attracting new sales in the following retail sectors will increase the market potential to attract new customers.

The highest demand for Downtown Mexico lies in several retail sectors including:

- Grocery Store - $10.4 million in unmet demand
- Other General Merchandise - $5.2 million in unmet demand
- Full Service Restaurants - $2.8 million in unmet demand
- Building Material & Supply Stores - $2.2 million in unmet demand

Grocery stores have the highest amount of unmet demand for the Trade Areas, although it should be noted there are grocery stores currently within the Downtown vicinity. However, the data indicates that this retail sector poses an opportunity for new retail development and the ability to become a destination for Primary and Secondary Trade Area shoppers. At the very least, the grocery niche could be partially covered through smaller convenience-type shops in Downtown. Specialty food stores could also help meet the unmet demand for this retail sector.

Downtown could support an additional 47,659 square feet of restaurant space alone. Meeting this demand would satisfy the Trade Areas unmet demand for causal and upscale dining. Adding restaurant space could introduce an additional $2.9 million dollars in sales to Downtown (assuming restaurant sales were $61 a square foot).

Other General Merchandise has the potential to cover a wide variety of items that are currently not available in Downtown and limited in the Primary and Secondary Trade Area. This retail sector has the ability to satisfy the boutique and specialty aspects that shoppers desire as well as attract a new variety of customers.

The final retail sector with a substantial unmet demand is Building Material & Supply Stores. Downtown currently has one store in this retail sector and could support a total of 12,000 square feet. Erdel & Wood Home Improvement has the potential to expand floor space and add additional products to capture a percentage of this sector.

Other opportunities for retail expansion exist in Downtown, including an unmet demand for clothing and shoe stores. Downtown Mexico currently has a few clothing stores which could expand their product line to include shoes or a wider variety of clothing for women, men, and children. In addition to expanding the existing clothing stores attracting a new clothing store would also be a viable option. The Village Square Association (VSA) should work on retaining all the existing business while encouraging stores to expand their existing inventory.

It will be important for VSA to identify the appropriate retail mix that will satisfy consumers and have staying power in Downtown. The new retail additions to Downtown should balance the need for boutique and specialty stores with anchors (i.e. grocery store, movie theater, building materials, etc.). Finding the appropriate balance will create a shopping destination in Downtown Mexico. Identifying the available space in Downtown is the next step to attracting viable retailers.

AVAILABLE RETAIL SPACE INVENTORY

Combining current conditions with the data collected during the Land Use, Building and Infrastructure Survey task (October 2008) PGAV PLANNERS has identified the following 18 first floor vacancies:

TABLE 18: 1ST FLOOR VACANCY

ID	Address	Available Sq.Ft.	ID	Address	Available Sq.Ft.
1	103 W Monroe	2,038	10	126 W. Jackson	1,990
2	117 W Monroe	1,600	11	104 N Jefferson	2,369
3	117 W Monroe	1,600	12	108 W Promenade	3,192
4	123 N Washington	2,819	13	324 W Promenade	4,684
5	116 N Clark	1,014	14	404 W Promenade E	6,000
6	109 S Washington	1,872	15	404 W Promenade W	4,904
7	111 S Washington	1,388	16	111 S Olive	3,898
8	117 S Washington	1,406	17	111 S Olive	528
9	119 S Washington	1,071	18	302 W Jackson	2,217

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

The locations listed on Table 18 (previous page) are depicted on the First-Floor Vacancy Map in Appendix D. There are 18 storefronts with vacancies totaling 44,591 square feet in Downtown Mexico. There are several vacancies that might accommodate an anchor type space such as grocery stores, restaurants, and other large retail attractions. Other vacancies smaller than 3,000 square feet will present the opportunity for boutique and specialty stores. Downtown should focus on filling current vacancies and in the future moving service and professional offices to upper-floor spaces.

Taking into consideration the retail opportunities described above, the size of each vacant space, and the location of each in Downtown Mexico, potential retail spaces can be matched with suggested retail services. This is illustrated in Table 19 and Figure 5 on the following page.

TABLE 19: POTENTIAL NEW RETAIL

ID	Address	Available Sq.Ft.	Potential Retail
1	103 W Monroe	2,038	Full Service Restaurant
2	117 W Monroe	1,600	Specialty Food Store
3	117 W Monroe	1,600	Specialty Food Store
4	123 N Washington	2,819	Full Service Restaurant
5	116 N Clark	1,014	General Merchandise
6	109 S Washington	1,872	Shoe Store
7	111 S Washington	1,388	General Merchandise
8	117 S Washington	1,406	Clothing Store
9	119 S Washington	1,071	Book, Periodical & Music Store
10	126 W. Jackson	1,990	General Merchandise
11	104 N Jefferson	2,369	Full Service Restaurant
12	108 W Promenade	3,192	Drinking & Entertainment
13	324 W Promenade	4,684	Grocery Store
14	404 W Promenade E	6,000	Building Material & Supply Store
15	404 W Promenade W	4,904	Building Material & Supply Store
16	111 S Olive	3,898	General Merchandise
17	111 S Olive	528	General Merchandise
18	302 W Jackson	2,217	Full Service Restaurant
	TOTAL	44,591	

The recommendations listed in Table 19 and displayed in Figure 5 are based upon an analysis of unmet retail demand from Table 17 and the total amount of available space (44,591 square feet). Table 19 represents the possible space allocation and locations that could best serve Downtown. It will be important for Downtown to have identified potential retail coupled with the ideal space when attempting to attract new retailers.

Figure 5
Retail Opportunities

Downtown Study Area
City of Mexico, Missouri

Legend
- Study Area
- Building Material & Supply Store
- Book, Periodical & Music Stores
- Clothing Store
- Drinking & Entertainment
- Full Service Restaurant
- General Merchandise
- Grocery Store
- Shoe Store
- Specialty Food Store

PGAVPLANNERS

D·R·E·A·M INITIATIVE

A large percentage of the existing vacant space (21%) was allocated to Full-Service Restaurants (9,443). New causal and upscale dining was a top priority in the community surveys. Attracting new restaurants will increase the number of visitors to Downtown and should be a top priority for VSA.

There are two buildings with 10,000 square feet that could accommodate a Building Material & Supply Store. Repurposing these buildings would allow for most of this unmet demand to be captured in Downtown. This retail sector presents an opportunity for Downtown Mexico. There are several opportunities for a grocery store or specialty food store in Downtown. The building located at 324 W. Promenade has a building footprint large enough to accommodate a grocery store. Figure 5 identifies several locations for a grocery or specialty food store.

There are other opportunities for existing 1st floor vacant space to be used as boutique stores, such as general merchandise, a microbrewery (Drinking & Entertainment), book, shoe and clothing store. Downtown Mexico should focus on the most sustainable options when considering new retail locations and development.

Table 20 illustrates the breakdown of each potential new retail category and the amount of available space allocated in Downtown. This space does not account for the possible retail area that would be absorbed by the expansion of existing retailers in Downtown.

TABLE 20: POTENTIAL RETAIL SPACE ALLOCATION

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[1]	Allocated Vacant Space
Building Material & Sup-	$ 2,207,989	14,393	10,905
Grocery Store	$ 10,397,916	67,782	4,684
Clothing Stores	$ 224,488	1,463	1,406
Shoe Stores	$ 350,201	2,283	1,872
Book, Periodical, and	$ 124,927	814	1,071
Florists	$ 111,036	724	-
General Merchandise	$ 5,197,731	33,883	8,818
Full-Service Restaurant	$ 2,884,525	47,659	9,443
Special Food Services	$ 2,105,361	34,785	3,200
Drinking & Entertainment	$ 98,602	1,629	3,192
TOTAL	**$ 23,702,776**	**205,417**	**44,591**

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

Downtown Mexico has a healthy commercial sector, increasing the diversity of retail shops will help to create a more vibrant Downtown. VSA should concentrate on increasing the daytime population that will frequent its restaurants and shops, with the addition of new customers and a wider variety.

DOWNTOWN MEXICO RETAIL GOALS

- ENCOURAGE TARGETED RETAIL USES

  Encourage targeted retail uses and appropriate pedestrian generating activities on the ground floor of all mixed-use and commercial buildings. The Village Square Association (VSA) should develop a list of targeted retail uses based on the Table 17 Future Retail Growth and the Community Surveys. Developing a Downtown Business Development Package will help in drawing the appropriate mix of retail uses. Integrating this program with specific marketing and promotion strategies could allow for VSA to fill the existing vacant first floor space and generate excitement with residents and customers.

- CREATE A DOWNTOWN ECONOMIC DEVELOPMENT COMMITTEE

  The committee would be tasked with addressing Downtown's retail market. The Economic Development Committee should be formed to address the retail needs and would be responsible for business and retail development. They would also be in charge of identifying the appropriate retail mix and have information available to attract new retailers. The committee should focus on filling Downtown vacancies with retail stores with a long term goal of creating the right retail mix and becoming more selective in its recruitment as the retail market continues to grow.

- CREATE A DOWNTOWN BUSINESS DEVELOPMENT PACKAGE

  VSA should lead the effort in recruiting new businesses to the area, and be supported by the Chamber of Commerce and the City. VSA should utilize the existing retail market information provided in this report as well as demographic information to develop the package.

  The Business Development Package should be professionally designed and should include:

  - Goals for attracting targeted retail stores and filling vacant first floor spaces.
  - List financial incentives to assist start-up of new businesses.
  - Diagram of the City's business permitting process.
  - List of property owners and vacant first floor spaces.
  - List of existing businesses in Downtown Mexico.

The Business Development Program should also help existing businesses succeed and grow, mainly through improving business operations and promotions. The Program should educate an inform retail business owners about product differentiation, product presentation, window displays, and importance of hours and days of operation, and how service and quality of product differentiate them from big box or franchise stores.

- DEVELOP SEMINARS FOR EXISTING BUSINESSES

  Develop a merchant education program to address issues of marketing, customer service, business and building maintenance, retail opportunities, trends, etc. General business issues such as marketing, customer service, store hours and store display and design should be provided as well as more detailed assistance. Clusters of similar Downtown businesses such as restaurants should be brought together to present specific topics. This is a critical outreach step for the VSA or Chamber to provide benefits to its businesses.

- ENCOURAGE EXISTING RETAIL EXPANSION

  Within the three trade areas there is demand that is not met in clothing stores, building material and supply stores and full-service restaurants. Existing businesses should consider expanding inventory, introducing new inventory or expanding their current space to capture additional retail dollars.

- INCREASE AVAILABLE RETAIL SPACE

  Increase available retail space in existing buildings through the reconstruction of internal common walls in order to expand building footprints. Where feasible relocate service uses from first floor to second floor. Develop a low interest loan program to promote this type of rehabilitation.

- INCREASE MARKETING & COLLECTIVELY MARKET DOWNTOWN RETAILERS

  These promotional efforts should primarily target residents and the region. A cooperative advertising campaign should be used for Downtown retailers using CID funds. Utilize brochures that highlight the positive features of locating retail businesses in Downtown. These brochures should be distributed to residents and visitors and inform the public about existing stores, new stores, hours of operations and special events. The brochures should contain information about existing stores, new stores, hours of operations and special events. Collective marketing is a cost effective approach to convey the image of Downtown and increases awareness.

Local newspapers and magazines, websites, radio, television ads, and flyers should effectively promote Downtown Mexico. The VSA should consider retaining professional advertising service to ensure the broadest and most effective coverage. CID funds could be used as a potential funding source.

- MARKET BUSINESS DEVELOPMENT LOAN PROGRAM

  Where possible, the VSA should establish a revolving loan fund for Downtown business development pursuits. In addition, look to utilize the Missouri Development Finance Board's Revolving Loan Fund which is available to Downtown Businesses for façade improvements. VSA should lead the effort in promoting.

- DEVELOP A DOWNTOWN DIRECTORY

  Develop a directory or brochure detailing the retailers and restaurants. Detailing the type of merchandise and eateries offered by Downtown stores will allow visitors and residents to fully experience Downtown. The directory should also include information on public transportation, parking, and other sites of significance.

- CREATE SHOPPING ORIENTED DOWNTOWN EVENTS

  Create events such as sidewalk sales, monthly evening shopping nights, storefront display contests, and others that are focused on shopping in Downtown. Shopping oriented events help to promote Downtown as a retail shopping destination experience.

- VERIFY & UPDATE COMMERCIAL VACANCIES & STORE MIX

  Track the vacancies and store mix in Downtown. Actively market vacancies and try to fill with stores from the targeted retail list. Working towards the recommended store mix to create a vibrant retail destination, VSA should continue to update the retail and vacancy maps and retail sector lists.

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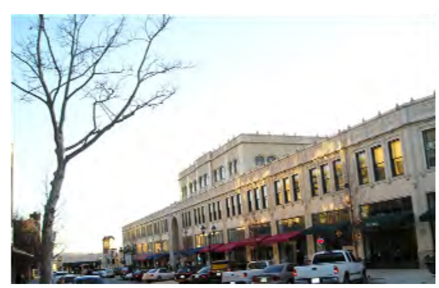
DOWNTOWN MEXICO STRATEGIES

The achievement of Downtown's retail goals can be obtained by implementing several key strategies. These strategies must be realistic, and they should be based on an understanding of Downtown Mexico's current retail market, its primary customers, and the 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 Mexico.

Re-energizing downtown retail can be a difficult, lengthy and complicated process. Traditional downtowns have changed dramatically in the past decades due to changes in lifestyles, consumer spending patterns, merchandising, and heightened competition for retail and restaurant spending. To achieve long-term success Downtown stakeholders must understand these changes and be willing to 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 downtown and destination. This happens when local people feel a sense of ownership, which extends beyond property lines to include private and public partnerships. These partnerships and 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 density and pedestrians were commonplace. Downtowns can continue to provide an environment where walking can be enjoyable and a practical means of getting around. Great streetscapes become an integral part of the community and provide the means for 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, public art, 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 offer unique identifiable areas such as outdoor seating, water features, and public art. To create great streetscapes that are comfortable and safe and still provide a high quality pedestrian environment, streetscapes should 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;

- seamless streetscapes with lighting and banners, planters and street trees, benches and other site furnishings;
- seasonal lighting that helps to create a festive and inviting environment;
- borders that offer a variety and stimulate interest in adjacent areas through the use of flower beds, sidewalk seating and cafes, benches and street trees;
- high quality amenities such as public art, streetscape elements and public amenities such as restrooms;
- safety for pedestrians with lighting, crosswalks, accessible ramps, bike racks, landscape and buffers, etc;

- 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, where feasible, dedicated bicycle lanes;
- continuous on-street parking and enforced slower vehicular speed limits;
- streetscape maintenance.

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 the declining vitality of some downtown businesses. It is important to recognize that parking is intended to serve user needs. 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 among others calming and slowing traffic while providing a buffer for pedestrian traffic.

Adequate numbers must be available to support area businesses. Parking lots are key elements in meeting these user needs and they should not only provide parking spaces, but be aesthetically pleasing and safe. Planting buffers should be provided at the edges of parking lots to screen the parking. Landscaped islands should be included through out the lot, improving not only aesthetics but minimizing the storm water run-off.

A clear and well lit pathway should be provided for pedestrians as well as signage that identifies public parking lots.

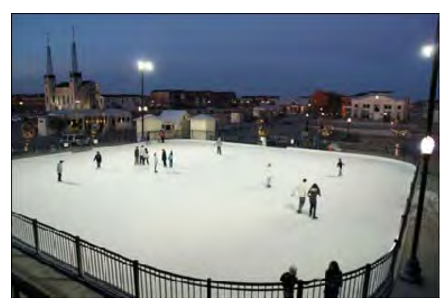
Establishing parking zones in Downtown is a way to ensure there is plenty of customer parking. This can be accomplished by signage that designates parking for customers. Employees and employers should not park in front of the retail establishments in Downtown, rather where possible, they should park in the rear of their establishments or at parking lots designated for employee parking.

Public Spaces

Public spaces are another 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 downtown's economic, environmental, social, and cultural image. Public spaces 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. Downtown public spaces should:

- Be easily accessible and visible from the street.
- Preserve and maintain trees and landscaping that provide shade, color, and natural edges.
- Create a pedestrian-friendly amenity area and activity space for special events. Public spaces should be flexible to accommodate a variety of multi-purpose events.
- Introduce flexible, moveable seating to complement traditional park benches.
- Enforce cleanliness and maintenance standards.
- Provide regulatory park signage and the authority to enforce regulations.
- Public areas should be safe.

DOWNTOWN ENVIRONMENT & APPEARANCE



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

The public and private sectors must continue their partnership to preserve and enhance an environment in which retail can thrive. This will require various means of creative cooperation between VSA, City staff, and private business and property owners to maximize the impact in Downtown Mexico. New public sector mechanisms such as a Community Improvement District (CID) or Tax Increment Finance District (TIF) may be needed to leverage funding programs or other funds for streetscape, open space and infrastructure improvements. Public sector activity should be aimed at inducing private investment in buildings and sites as part of a comprehensive physical revitalization program. The following items should be Mexico's priorities:

- Continued façade restoration and rehabilitation. The VSA and the City must work to encourage rehabilitation of Downtown buildings. Assistance with façade improvements, such as through the MDFB Revolving Loan Fund and other funding sources.
- Incentive programs should also recognize the need for work to the side and rear of buildings, some of which have attractive façades. One advantage of building renovation incentives is that they can be granted with conditions, providing an opportunity to ensure improvements are implemented on the entire building and lot.
- 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 Mexico's Downtown buildings and sites are properly maintained.

Business Retention, Expansion & Recruitment

A formal business retention, expansion and recruitment program is among the most cost-effective initiatives that a community can undertake and 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.

VSA should focus on maintaining goods and services that are currently provided within Downtown Mexico. Downtown will also need to attract additional retailers to create a vibrant retail destination. Retail and restaurant locations should be given priority for existing vacant spaces and new construction. The targeted retail establishments were identified in Table 18 (page 30.

A proactive business retention, expansion and recruitment campaign should be driven by the VSA and Chamber of Commerce. This campaign should also include existing business within Downtown. The retail recruitment team should encourage specific retail types, especially those that are looking to relocate, expand, and interested in an additional site.

The retail campaign should also take into consideration the needs of the residents and visitors. In addition to identifying new retail uses the campaign should monitor and track all commercial vacancies within Downtown Mexico. The campaign should also market itself to the community, surrounding regions and potential businesses.

Tools that should be used by the recruitment team include:

- Available Building List including an exterior photo, space dimensions, rental rates, contact information, and building amenities. Listings should also suggest the type of businesses for which the available space is best suited.
- Listing of target businesses to contact. The targets should be limited to retail, restaurants or unique services that would drive traffic and complement the existing business mix. A list of local bankers, real estate agents, and representatives from the nearest small business development center should also be developed to ensure they have up-to-date property listings and promotional information about Downtown.
- Description of any available incentives (e.g. grants, forgivable loans) for tenant improvements, and rent subsidies.
- Profiles of successful projects implemented by public/ private partnerships and testimonials from successful businesses in Downtown.
- Involvement of property owners as part of the solution and development of a strategy that incentivizes the right mix of retail services and amenities.
- Filling vacant storefront windows with paintings, sculpture, or other works by local artists.

This campaign should also foster the existing entrepreneurial spirit that exists within the community. Small businesses are the core of the local economy and they generate jobs and revenue for the community. Many aspiring business owners are not connected with financial resources, therefore providing technical support and loan opportunities can make a difference whether a business succeeds or fails. This can be accomplished through business plan review and funding opportunities as well as creating a seminar program for local entrepreneurs. Surveying the local businesses to see what topic would best serve the community is another activity that is frequently a benefit for local entrepreneurs.

VSA should work with local organizations to connect business owners with existing incentives, such as the MDFB Revolving Loan Fund or existing Business Assistance Program.

Some simple strategies to compete with big box stores include:

- Look for voids in the mass merchandisers inventory
- Adjust merchandise selection to sell different brands
- Consider upscale merchandise
- Sell singles instead of multi-pack merchandise
- Focus advertising on competitive advantages
- Emphasize expert technical advice and personalized service

This campaign will help direct the VSA, City of Mexico and Chamber of Commerce in guiding Downtown Mexico 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.

Anchors are large, well-known attractions with large customer draw. Usually anchors refer to retail establishments that attract customers, but can also be a single store or establishment, collection of establishments, or an institution. Retail loops should have an anchor located at the beginning and end of the street. Anchors generally include the following types of retail uses:

- Movie Theatres
- Farmer's Markets
- Grocery Stores
- Furniture Stores

To draw customers to Downtown, anchors should be identified, improved and promoted. Developing an anchor has the potential to serve as a year-round draw bringing in large numbers of visitors to the Downtown area.

When developing the correct retail mix, service and entertainment locations need to be included. Retail includes both shopping and dining attractions. A wide range of retail stores should include upscale clothing to kitchen gadgets. A wide selection of eating establishments should be provided, from independent coffee shops to full service restaurants. Service uses are also an integral part of successful downtowns, which include medical, legal services and healthcare. Entertainment venues also help to create a successful retail mix. Live music, street festivals, movie theatres and art galleries are included in this category. Creating the appropriate variety of retail will allow Downtown to become a true shopping and entertainment destination.

Promote Use of Upper Floor Space

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 market by creating additional demand for products and services. Downtown residents also ensure that an area has activity, even when businesses close. There is clear potential to increase residential development through apartments, condos or lofts on the upper floors throughout Downtown. While most upper floor spaces are currently vacant the VSA should promote these areas for residential and office space. VSA should also provide information regarding projects in other communities who have been successful in enhancing the Downtown residential base.

Enhancing the Purchasing Experience

Unique local shops thrive when they can work together to create a critical mass and become a destination as a group. Consumers want a downtown that is safe, clean, and friendly. The consumer going to the local shop is there for the experience of the shop, not the efficiency of buying everyday items.

To effectively compete with local strip commercial centers and big box retailers, Downtown Mexico must continue to convey an image and comfort level that welcomes shoppers, diners and casual visitors as well as creating a unique shopping experience.

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

- Carry the unique or higher-end items that can't be found elsewhere.
- Attract dissatisfied customers from the larger retailers.
- Offer expert, personalized assistance and extraordinary customer service.
- Consider shopping amenities like gift wrapping, free shipping, convenient return and exchange policies, recommendations to other area shops and restaurants, and special orders.
- Work smarter by using technology and eliminating wasteful overhead.

- Think like first-time customers walking into a store and ask, "What can I improve?"
- Extend store business hours.
- Individual retailers should implement a parking plan that requires employees to park away from the storefront, freeing up the most convenient on-street parking for customers.

ATTRACTING CUSTOMERS

Attracting customers is also an integral component of retail success. Downtown has established a pool of existing customers and need 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. To maintain customers and attract new customers retailers need to provide a unique experience. This can largely be accomplished by providing:

- Expert friendly customer assistance
- Unique merchandise
- Interesting environment not found elsewhere

Creating special promotions targeting Downtown employees 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 Mexico, not all visitors do. Increasing the capture rate of visitors is integral to the success of Downtown. This can be accomplished by a focus on marketing, signage, wayfinding, and a sense of activity. Providing standardized "you are here" maps at kiosks and establishments will help visitors navigate their way around Downtown. Downtown business guides and retailer/restaurant profiles should be made available on-line, at welcome centers, hotels and other shops and restaurants.

Another strategy in increasing customer traffic is to extend business hours. Small merchants can find it very difficult to stay open into evening hours, but having a critical mass of businesses open for shopping can transform a Downtown into a vibrant, active area. 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.

One option that many communities have adopted is a weekly or monthly event oriented around shopping. 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) is a great way to attract people to Downtown.

Event scheduling can also be extended to perhaps a first Friday or second Saturday; times when area businesses will be more likely to attract regional customers. During these events retailers should coordinate their hours. These are perfect opportunities to provide live music and sidewalk sales. These types of activities will create a festive and exciting atmosphere focused around Downtown. It is important to make the public aware of these special events through all types of marketing.

Marketing

The promotion of downtown attractions, businesses, and events is a major dimension of downtown development. These promotions are generally spearheaded by downtown organizations who recognize the necessity of reacquainting long-time residents and introducing newer residents and visitors to Downtown. Staging Downtown events, festivals, parades, concerts and other special events, will bring more people Downtown and expose them to what Downtown has to offer. The marketing and promotions strategy for Downtown should provide a mix of events and promotions that reflect different aspects of the region, including history, nearby natural amenities, cultural heritage and the quality of goods and services.

VSA should continue to utilize brochures that highlight the positive features of locating retail business in Downtown Mexico. Developing brochures that specifically highlight and illustrate the benefits of locating in Downtown should be of high importance. These brochures should include demographics, retail opportunities and recommended uses targeted at specific locations within Downtown.

It is important that existing shoppers and visitors become aware of existing stores, restaurants, and new businesses located in Downtown. A Downtown Directory about Downtown's business establishments should be distributed to residents and visitors, located in existing retail establishments and new stores. These brochures should be available at all Downtown establishments, visitor information centers and nearby hotels.

Overall marketing should be increased for Downtown and its retailers. These promotional activities should target residents, the secondary trade area and the overall region. Making the public aware of the wide range of activities and destination is the first step in marketing Downtown. Local store and restaurant owners and employees should refer their customers to visit other shops Downtown. This can also be accomplished by locating current downtown directories at check-out and waiting areas.

Shared advertising (e.g. newspaper ads promoting multiple businesses) can be beneficial to Downtown businesses for several reasons. Whether print or electronic media, shared ads promoting numerous businesses help build an image of Downtown as a place with multiple shopping opportunities. It can also make advertising more affordable and allow smaller businesses to use advertising media they might not otherwise

use. Downtown cross-promotion efforts could be expanded to include businesses located elsewhere in Mexico, especially those businesses that might draw customers or 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 identified earlier in this document. 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.

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. Stores must appear interesting and inviting at the sidewalk.

Simple additions of planters that flank 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 and be as inviting as possible.

The overall appearance of the storefront is also critical. The entrance door should be recessed from the sidewalk to emphasize the entry, provide shelter and remove the open door from the path of pedestrians on the sidewalk. The entrance should also be ADA compliant. The door should provide a view into the building as well as a sense of openness. The front entrance is not the only opportunity, rear entrances may also provide viable access to retail and

restaurant establishments. Rear entrances should be as inviting and appealing as the main entry.

After evaluating the curb appeal and storefront of each business the 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 product 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 their appearance encourages pedestrians to cross the street. When these windows are vacant they discourage pedestrians from crossing to the next corner. If there are vacant corner storefronts VSA should encourage rotating displays from other stores, or inserting information on upcoming festivals and local artwork.

WINDOW'S HOW TO

Window displays must grab the attention of the pedestrian so they will be drawn in. The following points describe possible alternatives for window displays:

- Develop 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, and storytelling, among others, 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 help 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 to your store. However, window lighting should not impose on upper story residents

- Change Window Displays. Displays should be rotated every four to six weeks.

Signage + Branding

When establishing business goals, owners must decide on their "brand" or define the store and how they hope to be perceived by customers. 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 your style and should always include your shop logo.

Interiors

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

- 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. This simple step will bring an empty store to life.

- Secondary Displays. These displays keep the customer moving, and successful displays encourages movement. This is accomplished by placing a variety of minor merchandise groups throughout the space. The height and shape of these displays should vary and interrupt long runs of repeating products on walls.
- Floor Space. The area 18" from the floor is not "shop -able" and is best used for storage.

- Make the Back Wall Visible. Make the back wall visible and interesting all the way from the front of the store to draw customers back. 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 to there.
- Grouping Merchandise. Techniques for grouping the merchandise can help shoppers make their decisions faster and therefore buy more merchandise while they are in the store.

- Buy Color. Group all red items together, blue items together, etc. This method is often used for seasonal displays.
- 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 often located by the register and are generally offered as add-ons. They are often inexpensive pick-up items.

Give customers the opportunity to learn about merchandise, provide customers information about special products and offer samples. All retailers should keep counters clean and clutter free. Show cases and display cases should be will-lit.

A downtown map and business directory should be located at each register. This will 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.

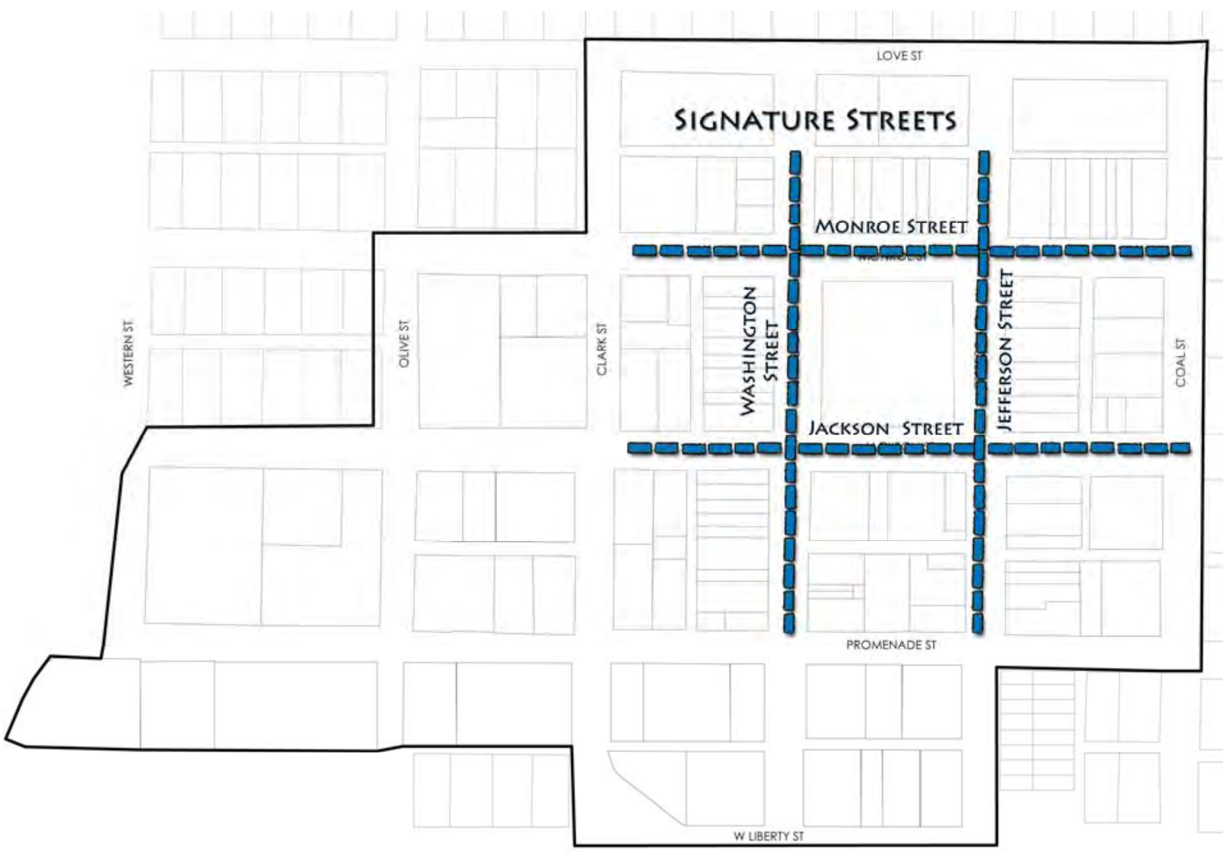
The combined attention a store's image receives from the street, its signage, storefront, window displays, entrances and interior, and customer service all work harmoniously to create a positive experience. This experience will remain with the visitor long after they leave the store and entice them to return as loyal customers.

IMPLEMENTATION

- CONSIDER THE DESIGNATION OF A RETAIL DISTRICT, AND WASHINGTON, MONROE, JEFFERSON AND JACKSON STREETS AS THE SIGNATURE STREETS WITHIN THIS RETAIL CORE.

While these streets are already home to a number of retail and restaurant establishments locating new retail establishments on these streets will reinforce the retail core in Downtown. Together these streets act as a spine for Downtown and are home to the existing retail that will generate the highest amounts of foot traffic. These streets will also act as a destination for Downtown and draw people from throughout the region. Reinforcing existing positive qualities with active retail uses along these streets will help increase the viability of the retail concept and the entire Downtown.

Figure 6: Signature Streets



Private sector investment should be encouraged along these streets to create a contiguous retail loop. The City of Mexico and the Village Square Association should focus their efforts on locating retail, housing, and entertainment options along these streets. Small, medium, and large-scale development opportunities along the core retail sections can potentially stimulate additional retail adjacent to the signature streets. This strategy should be taken on a block by block approach starting around the Square.

Table 21 illustrates the priorities for the signature streets in Downtown Mexico.

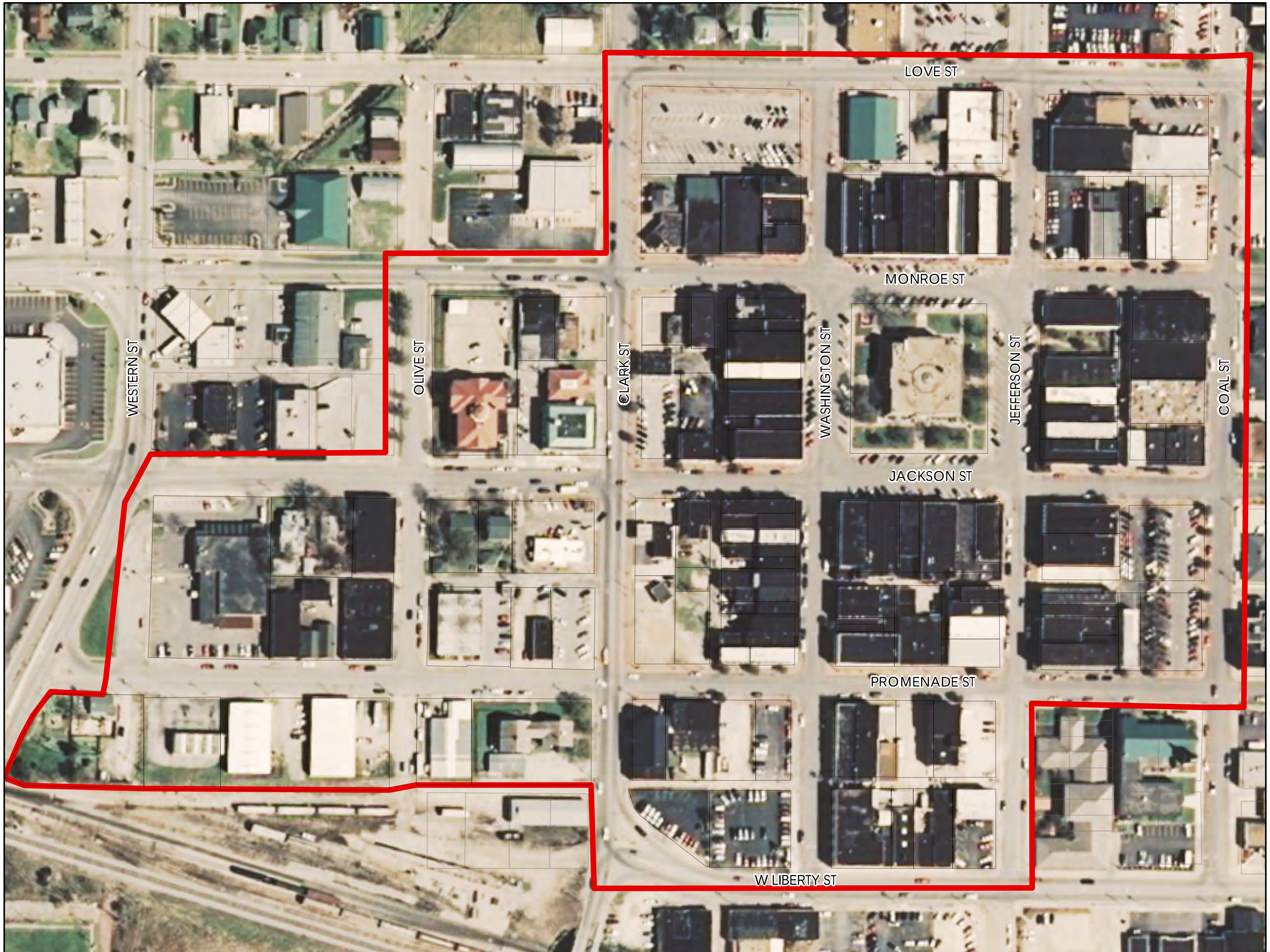
TABLE 21: PRIORITIES

High	Medium
Upper Story Residential Development	Streetscape & Landscaping
Sidewalk & Street Repair	Lighting
Building Façade Improvement	Signage
Retail Identification & Attraction	Improve Rear Façade
Maintenance	

Appendix

Appendix A-1
Downtown Mexico

Downtown Study Area
City of Mexico, Missouri



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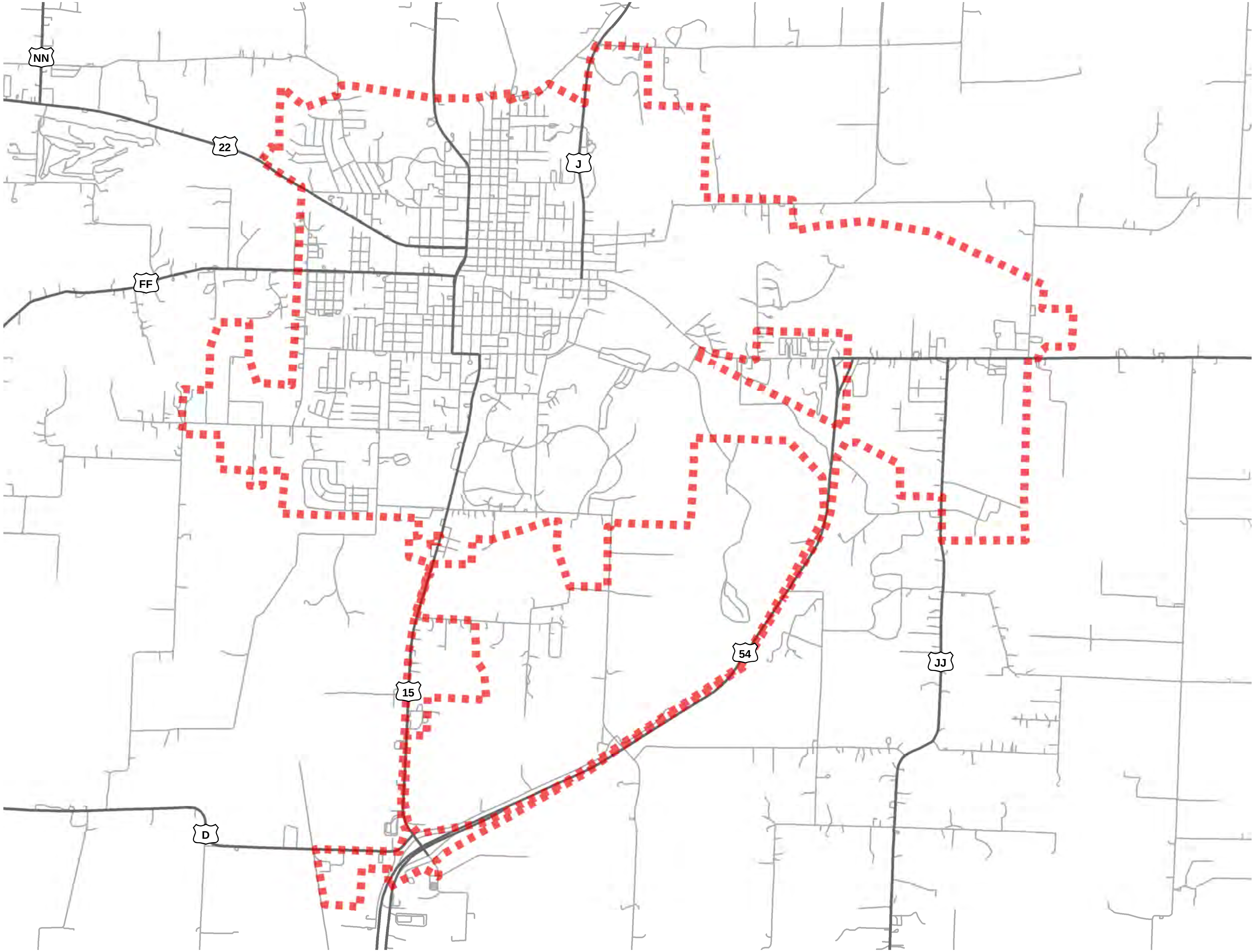
Study Area

PGAVPLANNERS

D·R·E·A·M INITIATIVE

Appendix A-2
Primary Trade Area

Retail Market Analysis
City of Mexico, Missouri



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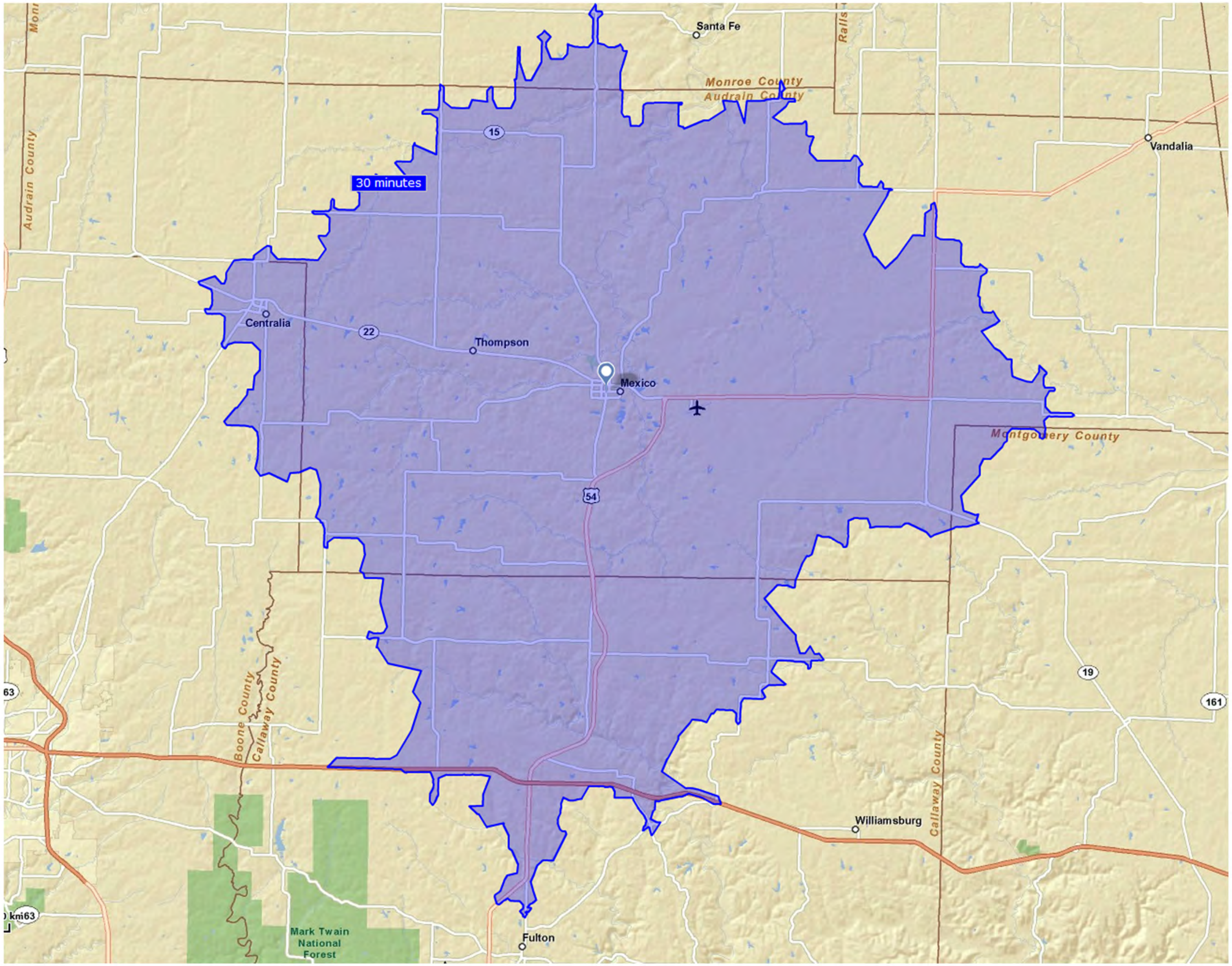
Primary Trade Area

Appendix A-3
Secondary Trade Area

City of Mexico, Missouri



Legend

Secondary Trade Area

Appendix B
Downtown Trade Area Pull-Factor
Downtown Mexico Study Area

Industry Group	Secondary Trade Area Demand	STA Businesses	STA Total Retail Sales	STA Gap	Potential Square Footage	STA Per Capita Demand	City Retail Demand	City Businesses	City Total Retail Sales	Downtown Total Retail Sales	Downtown Businesses	Downtown Trade Area Capture	Downtown Pull-factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$155,598,199	215	$216,688,276	$ (61,090,077)	(350,076)	5,864	$64,522,069	119	$124,330,003	$11,185,550	15	1,908	61.54
Total Retail Trade (NAICS 44-45)	$127,719,001	166	$191,935,866	$ (64,216,865)	(367,994)	4,813	$53,411,515	95	$112,673,785	$10,639,320	13	2,211	71.31
Total Food & Drink (NAICS 722)	$27,879,198	49	$24,752,410	$ 3,126,788	17,918	1,051	$11,110,554	24	$11,656,218	$546,230	2	520	16.77
Furniture & Home Furnishings Stores (NAICS 442)	$6,339,440	9	$77,445,553	$ (71,106,113)	(407,472)	239	$3,225,511	3	$25,692,810	$7,140,110	1	29,887	964.11
Furniture Stores (NAICS 4421)	$2,498,155	4	$51,383,640	$ (48,885,485)	(280,137)	94	$1,093,089	0	$0	$6,552,558	1	69,603	2245.25
Home Furnishings Stores (NAICS 4422)	$3,841,285	5	$26,061,913	$ (22,220,628)	(127,335)	145	$2,132,422	3	$25,692,810	$587,552	1	4,059	130.93
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$3,398,148	10	$4,682,671	$ (1,284,523)	(7,361)	128	$1,561,676	6	$2,533,180	$1,021,764	2	7,979	257.38
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$6,738,258	19	$5,791,895	$ 946,363	5,423	254	$2,723,304	12	$3,745,677	$449,663	2	1,771	57.12
Building Material and Supplies Dealers (NAICS 4441)	$6,343,155	12	$4,135,166	$ 2,207,989	12,653	239	$2,582,566	8	$2,919,110	$410,517	1	1,717	55.40
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$395,103	7	$1,656,729	$ (1,261,626)	(7,230)	15	$140,738	4	$826,567	$39,146	1	2,629	84.81
Food & Beverage Stores (NAICS 445)	$27,721,052	15	$17,750,600	$ 9,970,452	57,136	1,045	$12,615,645	7	$15,070,415	$278,033	1	266	8.59
Grocery Stores (NAICS 4451)	$27,316,549	12	$16,918,633	$ 10,397,916	59,585	1,029	$12,534,222	6	$14,348,773	$278,033	1	270	8.71
Specialty Food Stores (NAICS 4452)	$206,286	3	$831,967	$ (625,681)	(3,585)	8	$0	1	$721,642	$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	$198,217	0	$0	$ 198,217	1,136	7	$81,423	0	$0	$0	0	0	0.00
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$4,263,068	11	$7,965,064	$ (3,701,996)	(21,214)	161	$1,712,743	10	$6,708,869	$579,027	1	3,604	116.27
Clothing and Clothing Accessories Stores (NAICS 448)	$2,746,299	8	$2,562,599	$ 183,700	1,053	103	$1,009,886	5	$2,041,698	$162,410	1	1,569	50.62
Clothing Stores (NAICS 4481)	$1,588,230	4	$1,363,742	$ 224,488	1,286	60	$471,484	2	$1,070,872	$51,745	1	865	27.89
Shoe Stores (NAICS 4482)	$350,201	0	$0	$ 350,201	2,007	13	$152,412	0	$0	$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$807,868	4	$1,198,857	$ (390,989)	(2,241)	30	$385,990	3	$970,826	$110,665	1	3,635	117.26
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$1,257,123	11	$1,558,254	$ (301,131)	(1,726)	47	$573,109	5	$1,257,543	$152,336	1	3,216	103.73
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$1,132,196	11	$1,558,254	$ (426,058)	(2,442)	43	$559,439	5	$1,257,543	$152,336	1	3,570	115.17
Book, Periodical, and Music Stores (NAICS 4512)	$124,927	0	$0	$ 124,927	716	5	$13,670	0	$0	$0	0	0	0.00
General Merchandise Stores (NAICS 452)	$44,685,379	7	$45,244,213	$ (558,834)	(3,202)	1,684	$17,737,762	4	$40,617,449	$0	0	0	0.00
Department Stores Excluding Leased Depts. (NAICS 4521)	$24,875,287	3	$30,631,852	$ (5,756,565)	(32,988)	937	$9,171,874	2	$30,534,916	$0	0	0	0.00
Other General Merchandise Stores (NAICS 4529)	$19,810,092	4	$14,612,361	$ 5,197,731	29,786	747	$8,565,888	2	$10,082,533	$0	0	0	0.00
Miscellaneous Store Retailers (NAICS 453)	$2,691,036	27	$4,182,607	$ (1,491,571)	(8,547)	101	$1,141,325	19	$3,349,926	$309,747	4	3,054	98.53
Florists (NAICS 4531)	$407,360	3	$296,324	$ 111,036	636	15	$202,975	2	$241,539	$66,263	1	4,316	139.24
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$1,001,557	7	$2,311,034	$ (1,309,477)	(7,504)	38	$444,784	4	$2,128,397	$69,247	1	1,835	59.18
Used Merchandise Stores (NAICS 4533)	$123,280	11	$377,397	$ (254,117)	(1,456)	5	$28,373	9	$306,474	$73,854	2	15,897	512.81
Other Miscellaneous Store Retailers (NAICS 4539)	$1,158,839	6	$1,197,852	$ (39,013)	(224)	44	$465,193	4	$673,516	$100,383	1	2,299	74.15
Food Services & Drinking Places (NAICS 722)	$27,879,198	49	$24,752,410	$ 3,126,788	51,662	1,051	$11,110,554	24	$11,656,218	$546,230	2	520	16.77
Full-Service Restaurants (NAICS 7221)	$9,804,600	25	$6,920,075	$ 2,884,525	47,659	369	$3,459,764	15	$4,085,922	$360,046	2	974	31.43
Limited-Service Eating Places (NAICS 7222)	$13,179,394	16	$15,141,094	$ (1,961,700)	(32,412)	497	$5,255,486	7	$7,342,737	$186,184	1	375	12.09
Special Food Services (NAICS 7223)	$4,254,260	3	$2,148,899	$ 2,105,361	34,785	160	$2,121,358	1	$137,038	$0	0	0	0.00
Drinking Places & Entertainment Places (NAICS 7224)	$640,944	5	$542,342	$ 98,602	1,629	24	$273,946	1	$90,521	$0	0	0	0.00

Positive Pull factors

Retail Opp

Appendix C
Retail Locations

Downtown Study Area
City of Mexico, Missouri

ID	TENNANT
1	Coal Street Antiques
2	Homestead Hearth/ JC Penny Catalogue Store
3	Erdel & Wood Home Improvement Center
4	Pilcher Jewelry & Weddings by Pilchers
5	GT Express Shoppe
6	Mexico Music/Scrapbook Store and More
7	Remedies Salon & Spa
8	Melody's Quality Jewerly
9	Picton Furniture
10	Jim Stubblefield Furniture
11	Pizza Works
12	Charms Hallmark
13	Nick's Bar & Grill
14	Kandy's Kreative Kuts
15	SOS Shipping Plus
16	Bob's Appliance Center/ Fleming Electronics
17	Dugout Bar & Grill
18	Radio Shack/Cinema Plus
19	Ron's Barber Shop
20	Lucky 7 Barbershop
21	Santa Fe Trail Resale
22	Merle Norman Cosmetic & Gift Gallery
23	Coah's Pizza World
24	Mark's Music
25	Mexico Sewing Center
26	US Cellular/Cathy's Consignments
27	Hair World
28	Graphitti/Herbal Emporium
29	TIger Pawn
30	Wine on Washington
31	China Restaurant
32	R & B Furniture/Jackson Street Diner/ Jefferson Beauty Shop
33	K & M Printing
34	TJ's Hair Affair
35	Fastenal Company
36	Winn Auto Parts
37	Ice Cream Parlor

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Appendix D
1st Floor Vacancy

Downtown Study Area
City of Mexico, Missouri

Legend

1st Floor Vacancy

Study Area

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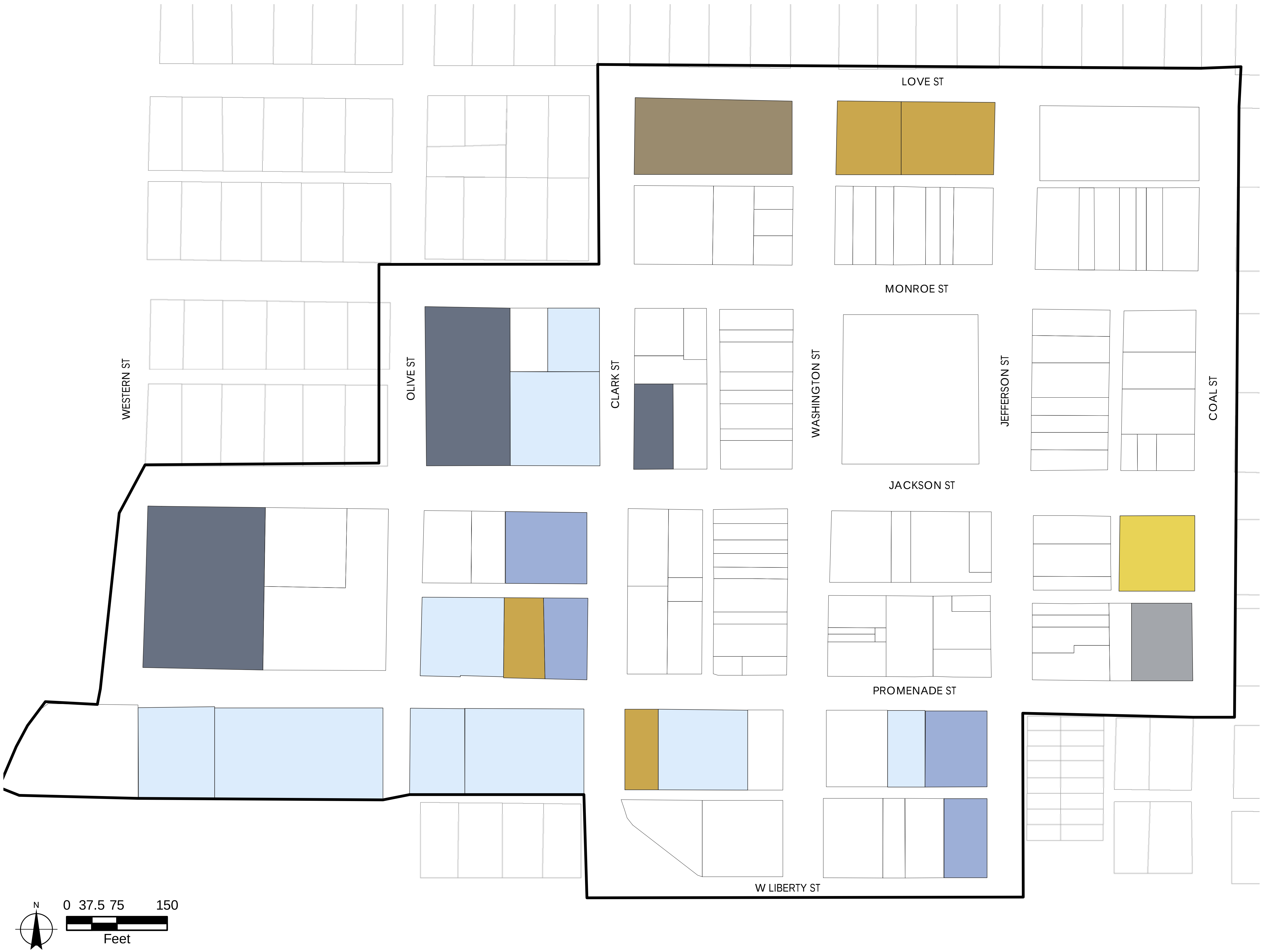
Appendix E
Parking Inventory

Downtown Study Area
City of Mexico, Missouri



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
- 81-90 Parking Spaces
- Study Area

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Appendix F

Existing Store Checklist

Exterior

Storefront:

- Check Overall Condition, are repairs needed?

  ☐ Yes

  ☐ No

  ☐ Renovation/Remodel Preferred

  Description

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- Is new paint needed?

  ☐ Yes

  ☐ No

- Does the paint match the store brand/logo?

  ☐ Yes

  ☐ No

  Description

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- Is the storefront generally clean?

  ☐ Yes

  ☐ No

  Description

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

  ☐ Yes

  ☐ No

Existing Store Checklist

Storefront:

- Are there hazards in front of the storefront?

☐ Yes

☐ No

Description

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- Is the sidewalk clean and level?

☐ Yes

☐ No

Description

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Exterior Signage:

- Does signage occur at eye level (Pedestrian)?

☐ Yes

☐ No

Description

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- Does signage occur at car level (Driver)?

☐ Yes

☐ No

Description

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DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
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INITIATIVE

Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

☐ Yes

☐ No

Description

- Is signage maintained in good condition?

☐ Yes

☐ No

Description

- Does the signage complement the building and area?

☐ Yes

☐ No

Description

- Are the exterior signs lighted (at night)?

☐ Yes

☐ No

Description

Existing Store Checklist

Display Windows:

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

  Description

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- Are window displays rotated every 4-6 weeks?

  ☐ Yes

  ☐ No

- Do the displays effectively represent the store brand?

  ☐ Yes

  ☐ No

- Are displays including the best/most poplar products?

  ☐ Yes

  ☐ No

  Description

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- If it's a corner shop window, do the window displays encourage the pedestrian to cross the street to your block?

  ☐ Yes

  ☐ No

  Description

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- Are the window displays lit at night?

  ☐ Yes

  ☐ No

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Existing Store Checklist

Interior

Flooring:

- Is the floor worn/hazardous/slippery?

☐ Yes
☐ No

- Is the floor clean?

☐ Yes
☐ No

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

☐ Yes
☐ No

- Is there a walk off area to clean shoes?

☐ Yes
☐ No

Description

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Ceiling:

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

☐ Yes
☐ No

Description

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- Is the HVAC duct work clean?

☐ Yes
☐ No

Existing Store Checklist

Ceiling:

- Are there any other distracting issues?

Description

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Lighting:

- Is the lighting adequate to show the merchandise?

☐ Yes

☐ No

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

☐ Yes

☐ No

- Are the bulbs the same type?

☐ Yes

☐ No

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

☐ Yes

☐ No

Description

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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 brand/ 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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Existing Store Checklist

Circulation:

- Is the intended path clear to customers?
  - ☐ Yes
  - ☐ No
- Are off-limit areas clear to the customer?
  - ☐ Yes
  - ☐ No

- Are there slow pockets of merchandise that receive little attention?
  - ☐ Yes
  - ☐ No

  Description

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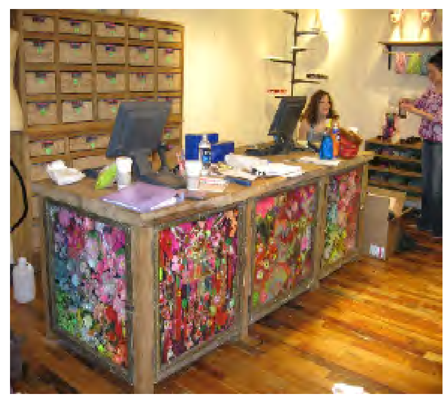

Cash Wrap/Register:

- Is the cash wrap area in good condition?
  - ☐ Yes
  - ☐ No
- If there's a showcase, is the lighting adequate?
  - ☐ Yes
  - ☐ No
- Is it easy for customers to locate where to cash out?
  - ☐ Yes
  - ☐ No

- Is the floor area clear to assure ease in purchasing?
  - ☐ Yes
  - ☐ No
- Is the counter top clutter-free?
  - ☐ Yes
  - ☐ No
- Is the location appropriate (it should not occupy prime real estate)?
  - ☐ Yes
  - ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Cash Wrap/Register:

- Are the views of the shop and exits open enough for security?

  ☐ Yes

  ☐ No

- Is there fixture nearby for impulse purchases?

  ☐ Yes

  ☐ No

  Description

Fixtures & Equipment:

- Does the fixture style match the brand or logo?

  ☐ Yes

  ☐ No

- Is there a range of heights and sizes to keep the eye moving?

  ☐ Yes

  ☐ No

- Is the un-shoppable high area (72") used for display?

  ☐ Yes

  ☐ No

- Is the un-shoppable low area (18") un-stocked and/or used for storage?

  ☐ Yes

  ☐ No

  Description

Merchandising:

- Are the products restocked or re-arranged consistently to make the store feel full?

  ☐ Yes

  ☐ No

Existing Store Checklist

Merchandising:

- Are the displays group by color, material or product brand?

  ☐ Yes

  ☐ No

- Does the product inventory match the internet site?

  ☐ Yes

  ☐ No

  Description

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

  ☐ Yes

  ☐ No

  Description

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Cleanliness:

- Is the store clean?

  ☐ Yes

  ☐ No

  Description

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- Are boxes cleared and out of sight?

  ☐ Yes

  ☐ No

- Are the views into off limits areas blocked?

  ☐ Yes

  ☐ No

Existing Store Checklist

Cleanliness:

- Are the signs and product pricing 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 the entry doors easy to open and close?
  - ☐ Yes
  - ☐ No
- Are the displays and fixtures stable?
  - ☐ Yes
  - ☐ No
- Is music incorporated to make the store feel occupied?
  - ☐ Yes
  - ☐ No
- Does the music reflect the store brand?
  - ☐ Yes
  - ☐ No

Dressing Rooms:

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

D·R·E·A·M INITIATIVE

Existing Store Checklist

Dressing Rooms:

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

Staff:

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

  Description

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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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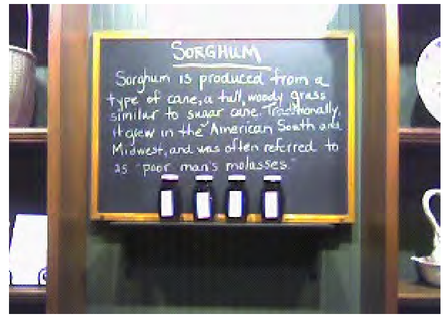

D·R·E·A·M INITIATIVE

Appendix G

Table References

APPENDIX H

Detailed Market Data—Table of Contents

The following tables are provided in electronic format.